



## December 2017: UK Residential Market Survey

# Headline activity indicators remain subdued for now

- National price balance edges upwards but agreed sales slip
- Twelve month outlook for prices and sales more upbeat
- 86% of respondents report no response yet from first time buyers following changes to Stamp Duty

The December 2017 RICS UK Residential Market Survey results continue to display a lack of momentum at the headline level. Near term activity indicators reported on are still either broadly flat or slightly negative. That said, there is a more sanguine tone to those series capturing medium term expectations.

The headline price balance moved to +8% in December following a reading of zero in November. As such, this measure is now consistent with a marginal increase in prices nationally (on the most closely followed indices) over the coming months. When disaggregated, the price gauge for London remains in negative territory (-32%), albeit less so than in any month since April last year. Meanwhile, the price balance for the South East recorded a reading of -15% in December compared with the November balance of -23%. In most other areas, survey results point to further price growth with the strongest figures being reported in Wales, Northern Ireland, the North West and the Midlands.

The three month price expectations series remains negative at the national level with the net balance standing at -6% (compared to -4% last time) highlighting a lack of conviction surrounding the near term outlook. The London reading remains the most negative (although it is again less so than it has been for some months) with the strongest results coming from Wales, Northern Ireland and Scotland. Significantly, over the coming year; respondents expect prices to increase in all areas with the exception of London (where prices are still expected to decline).

Turning to activity, new buyer enquiries edged lower during December having stabilised somewhat in the previous report. A net balance of -15% of respondents noted a decline in demand (as opposed to an increase) compared with -5% in November. What's more, when contributors were asked whether they have seen an immediate increase in first time buyer enquiries following changes to Stamp Duty in the Autumn Budget, an overwhelming majority of 86% across the UK as whole said they hadn't (although this may have been influenced by the Christmas holidays)

Agreed sales also fell at the national level as -13% more respondents reported a decline in transactions following a reading of -10% previously. Significantly, Scotland, Northern Ireland and the North East region were the only

areas to have seen a pick-up in transactions over the month, whereas sales trends were either flat or negative across the rest of the UK. Sales expectations nationally remain flat over the coming three months. However, respondents are more optimistic over the twelve month horizon. Indeed after remaining broadly flat in the previous five months, sales expectations are now notably more positive and activity is anticipated to pick-up across all regions/countries (with London recording its first positive reading since last June).

An additional question was included in the survey designed to capture the likely impact on the market over the coming months following the Stamp Duty change. Nationally, the majority of respondents (66%) anticipated it having little consequence, whilst 12% felt it would result in higher overall activity. In London, 48% envisaged not much response, with a higher proportion of respondents compared to the national figure (28%) saying the changes will increase overall market activity. The results for the wider South East are closer to the national picture.

Looking at supply, new instructions to sell continued to decline at the headline level, extending a run of 23 months in which this series has not posted a positive reading. Comments from respondents continue to emphasise the adverse impact this is having on the market. Average stock levels on estate agents books remained broadly steady, still close to historic lows. Contributors were asked to compare the number of appraisals undertaken over the month with the same period last year. In December, the largest share of respondents (46%) stated that appraisals were lower. However 23% noted that appraisals were higher on a like for like basis; this compares to only 15% of respondents in November that cited an increase in appraisals, signalling a possible improvement for the new instructions pipeline in the near future.

In the lettings market, tenant demand continued to fall during December (on a non-seasonally adjusted basis) albeit the pace of decline eased somewhat from the previous report. Meanwhile new landlord instructions declined at a slightly faster rate. As a result, rental growth expectations were modestly positive for the three months ahead (net balance moved to +9% from +4%).

\*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:

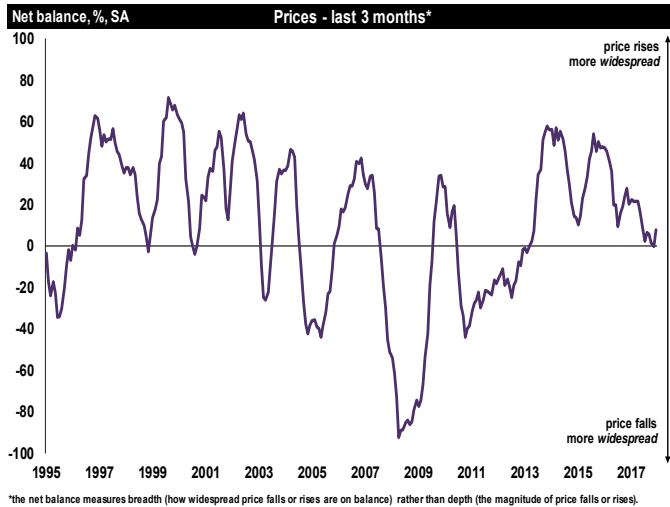
- January Survey: 8 February**
- February Survey: 8 March**
- March Survey: 12 April**

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

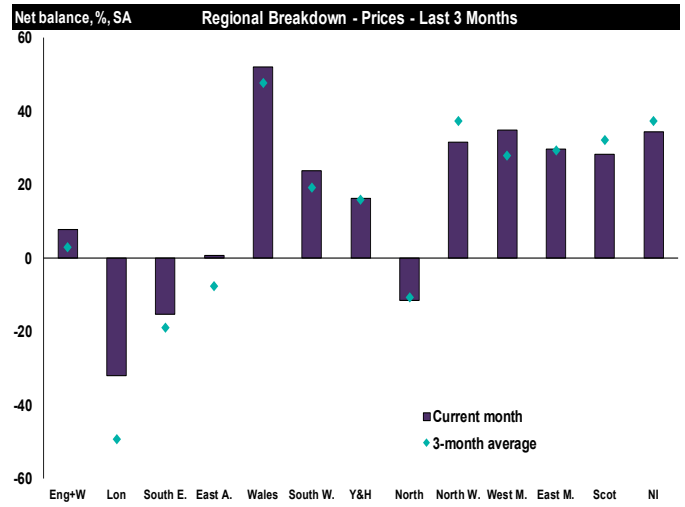
- This survey sample covers 530 branches coming from 312 responses

# Sales market charts

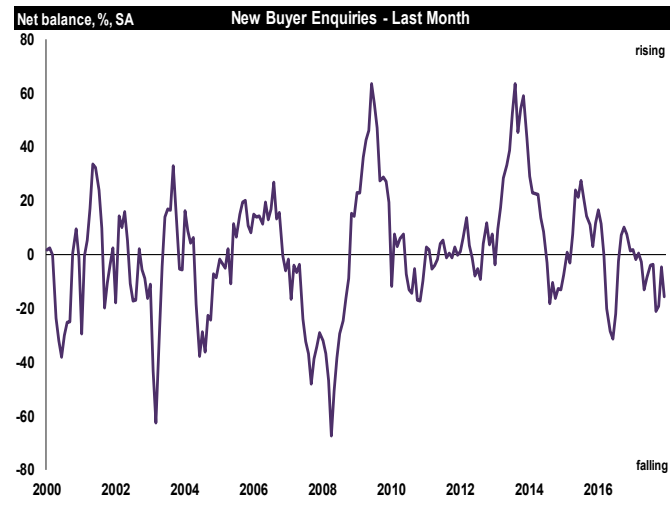
National Prices - Past three months



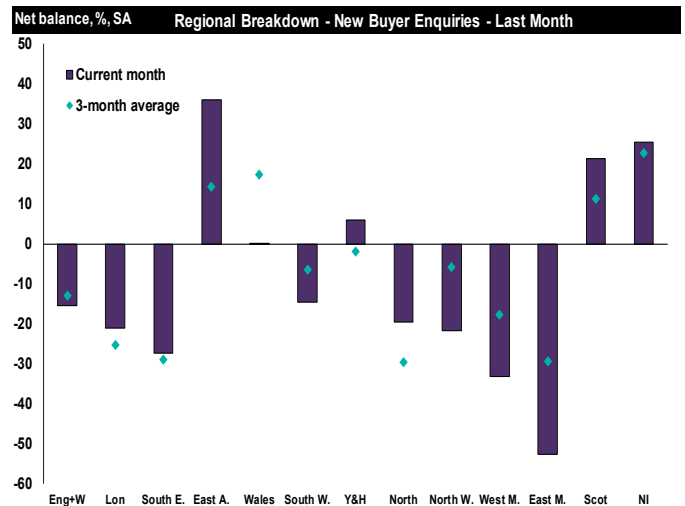
Regional Prices - Past three months



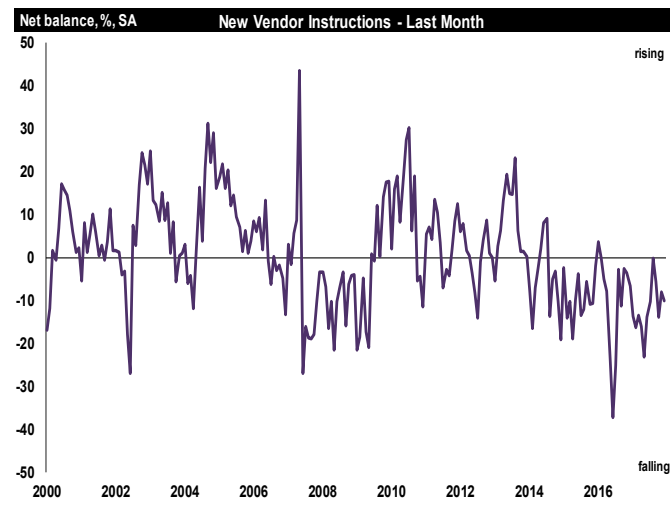
National Enquiries - Past month



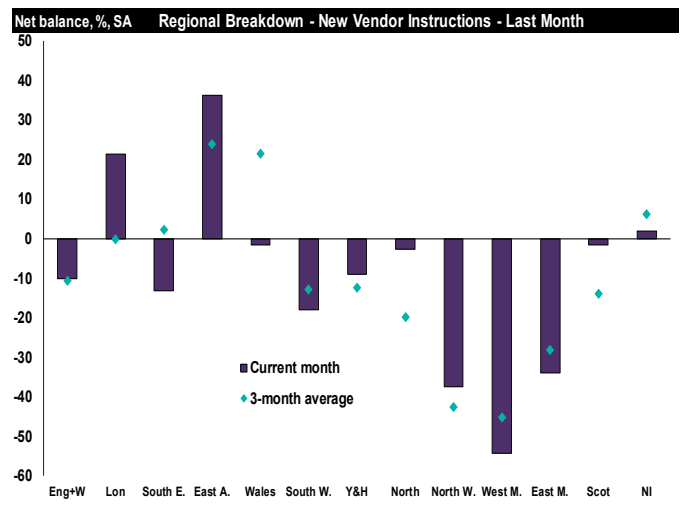
Regional Enquiries - Past month



National New Vendor Instructions - Past month

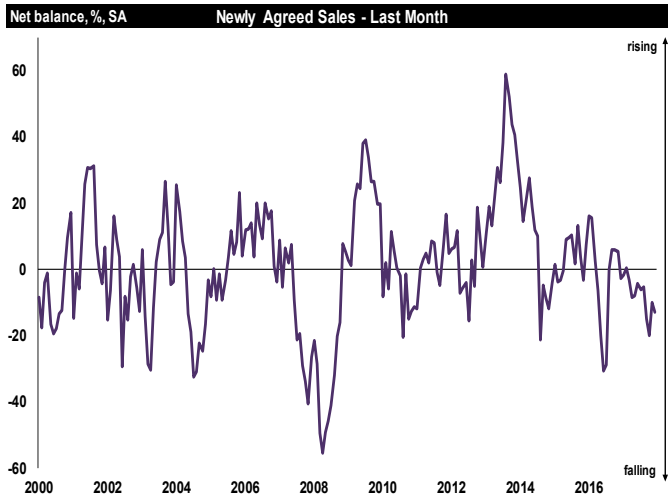


Regional New Vendor Instructions - Past month

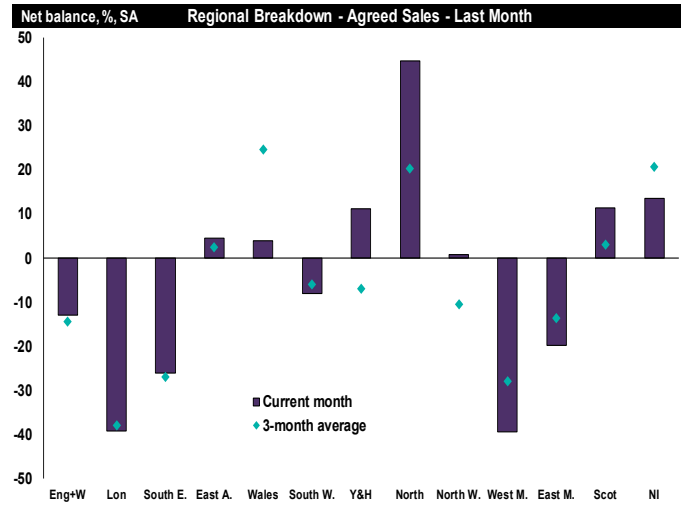


# Sales market charts

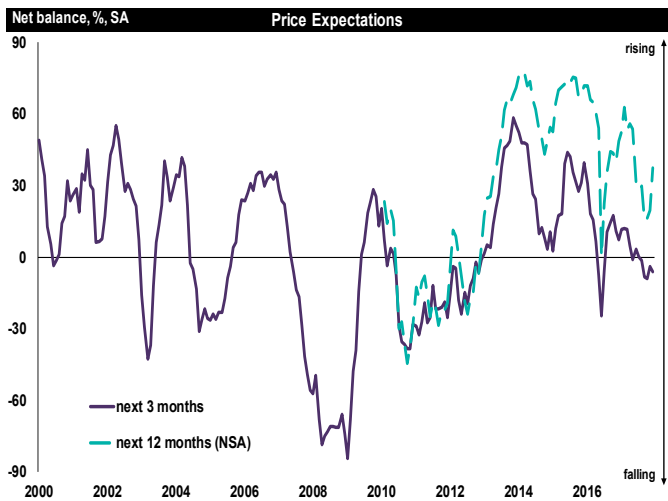
National Newly Agreed Sales - Past month



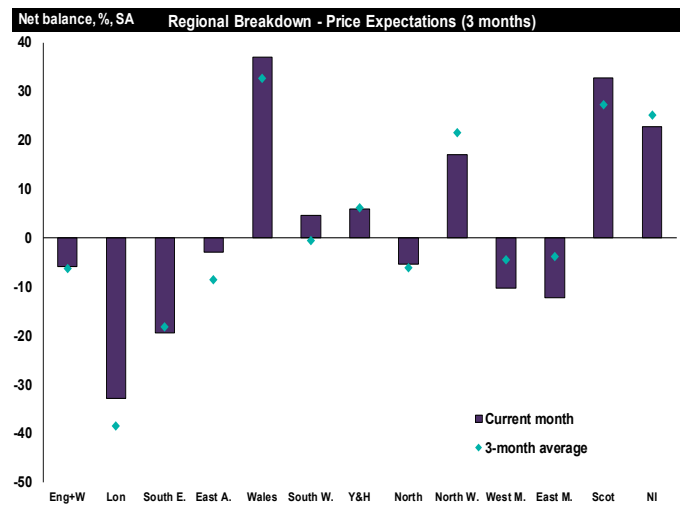
Regional Newly Agreed Sales - Past month



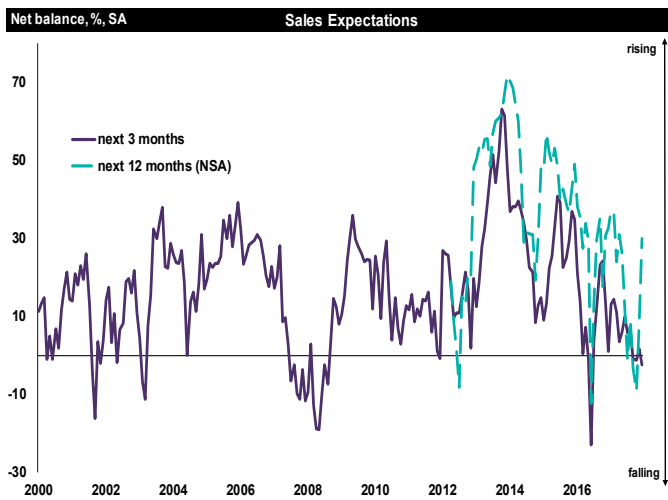
National Price Expectations - Three and twelve month expectations



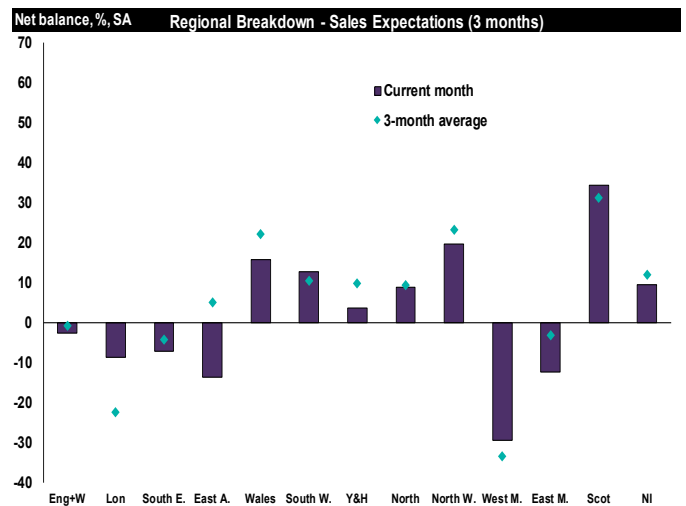
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

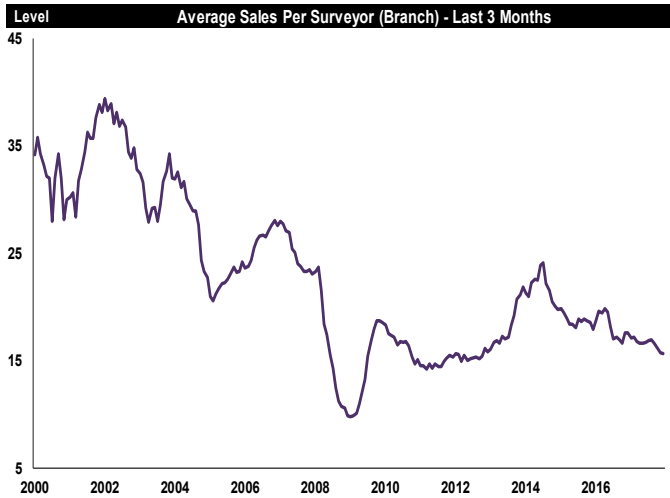


Regional Sales Expectations - Next three months

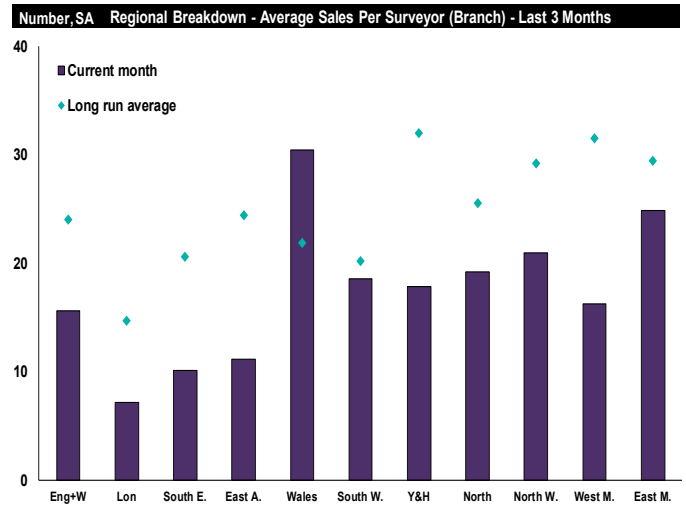


# Sales market charts

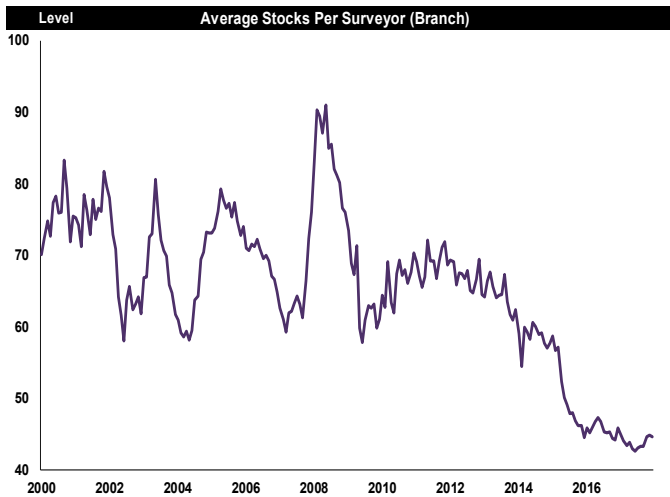
National Average Sales Per Surveyor - Past three months



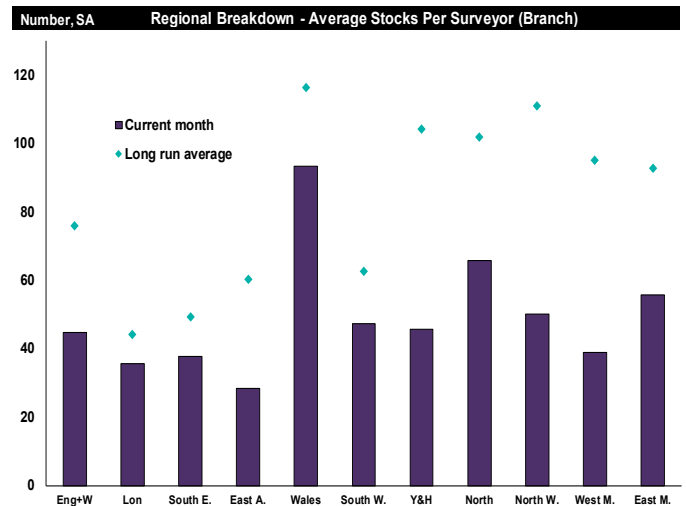
Regional Average Sales Per Surveyor - Past three months



National Average Stocks Per Surveyor



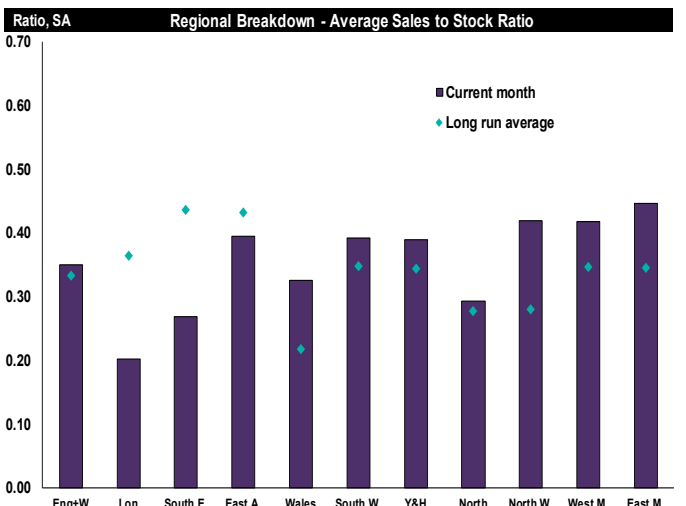
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

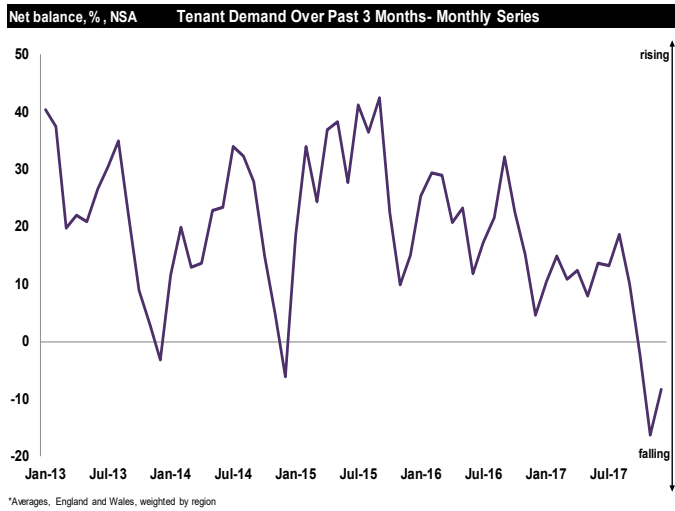


Regional Sales to Stock Ratio

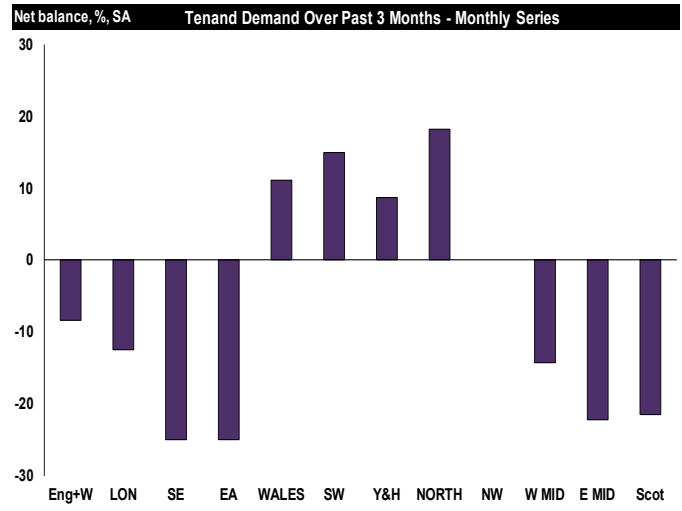


# Lettings market charts

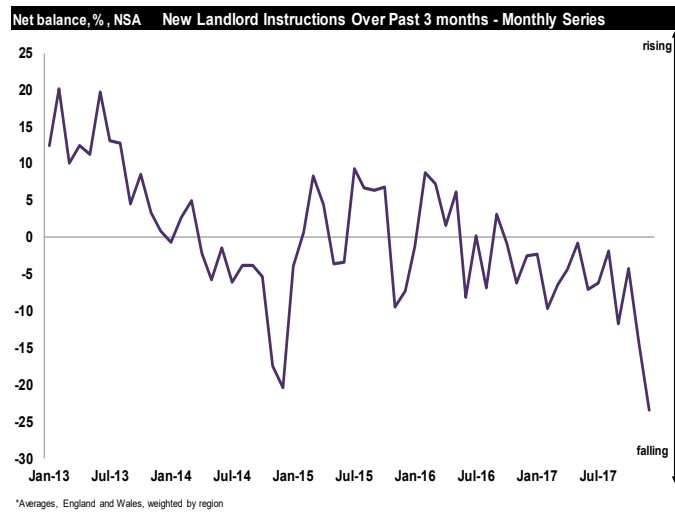
National Tenant Demand - Past three months



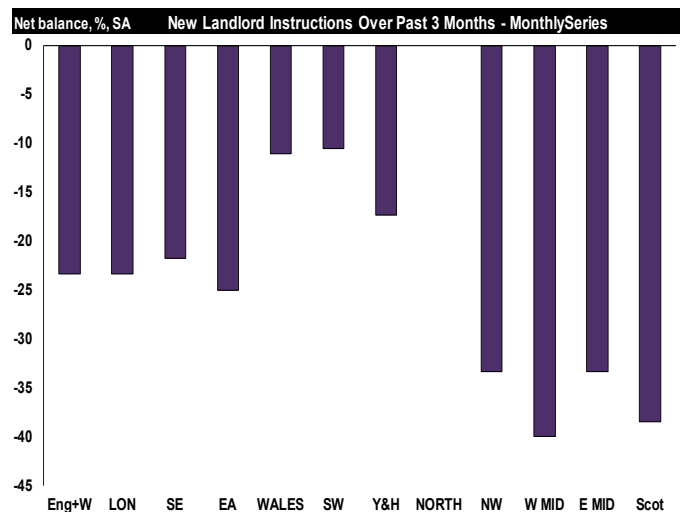
Regional Tenant Demand - Past three months



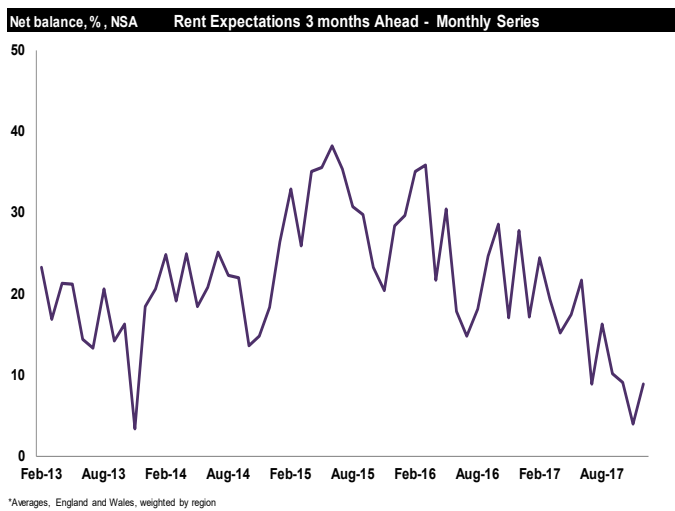
National New Landlord Instructions - Past three months



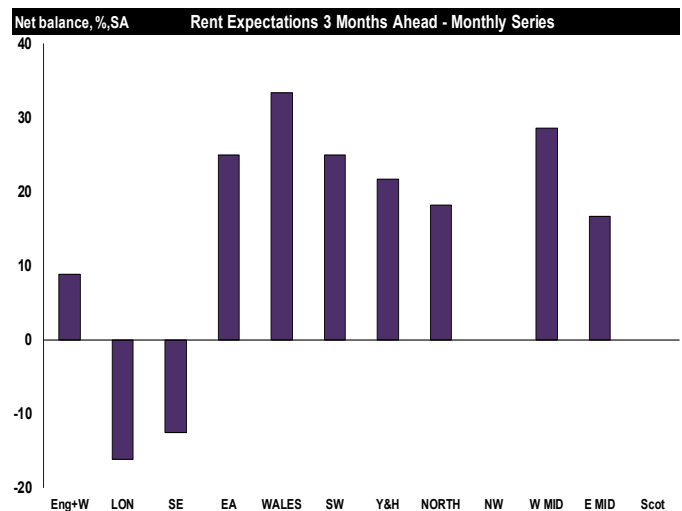
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

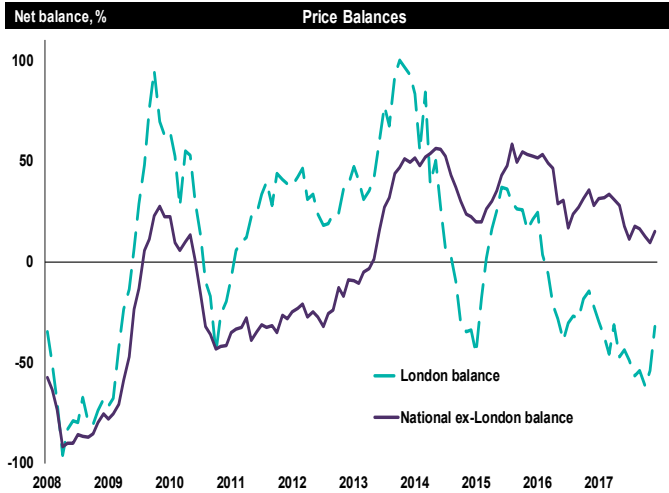


Regional Rent Expectations - Next three months

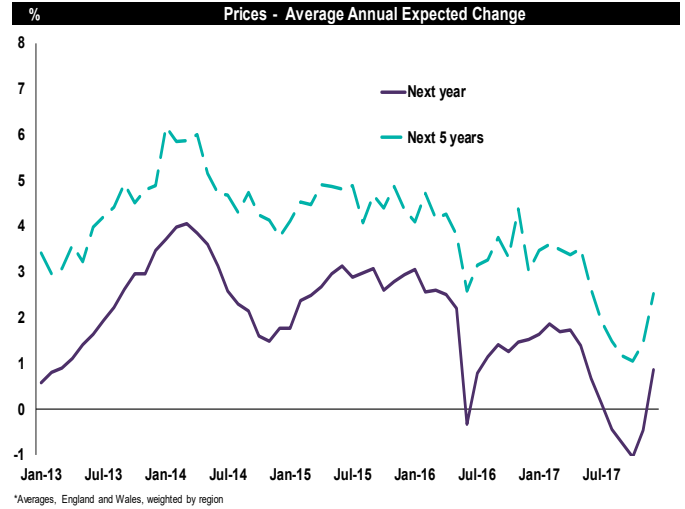


# Expectations & other data

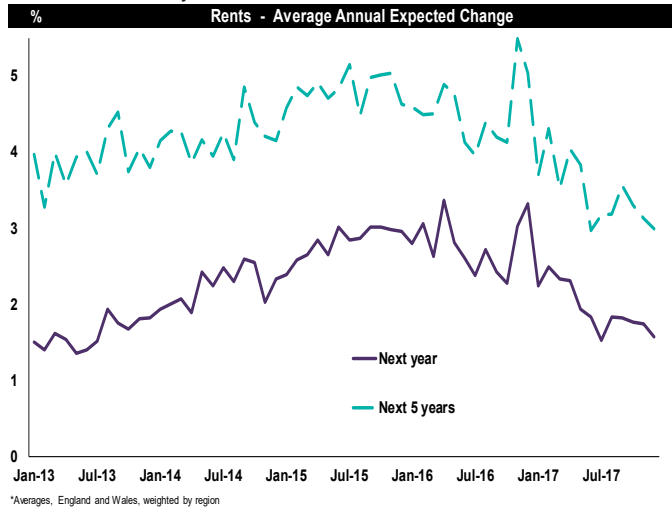
National Price Balance (excluding London) and London Price Balance - Past three months



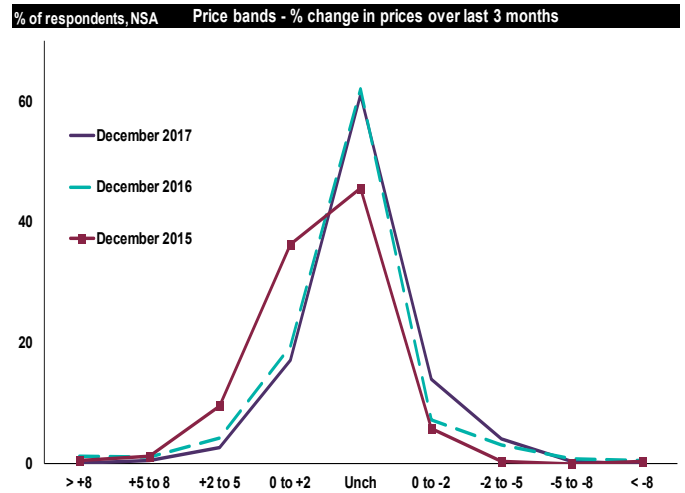
National Average Annual Expected Price Change (point estimate) - Next one and five years



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 Dip Surv MRICS, Kendal, Thomson Hayton Winkley Estate Agents, 01539 815700, achh@thwestateagents.co.uk - A steady month for December, ending the year well. The diary for January is already encouragingly busy.

Neil S Foster Bsc (Hons) Mrics, Newcastle upon Tyne, Foster Maddison Property Consultants, neil.foster@fostermaddison.co.uk - A quiet run into Christmas but the market re-ignited swiftly after the festivities buoyed by well timed new listings for the New Year.

Paul Mckimmings BSc MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com - Busy December with good levels of survey instructions for the time of year. Cautious optimism for the coming year.

Ranald Morgan MRICS, Northumberland/Scotland, Knight Frank, ran.morgan@knightfrank.com - Without doubt LBTT and taxation policy is affecting the decline in the upper end of the market. Prices are being forced up at the lower end due to relaxation of tax charges.

Simon Bainbridge MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com - A solid month in terms of exchanges and completions and reasonable viewing activity despite the run up to the Christmas break.

T H Brannen FRICS, Coast / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - One hopes for a prosperous New Year for all.

## Yorkshire & Humberside

Alex Mcneil MRICS, Huddersfield, Bramleys, 01484 530361, alexmcneil@bramleys1.co.uk - Strong underlying demand in most market sectors and prices are likely to continue rising with there being a shortage of housing stock available to purchase.

Ben Hudson MRICS, York, Hudson Moody, 01904 650650, benhudson@hudson-moody.com - Lack of stock keeping prices high.

Bill Dale MRICS, Ilkley, Dale Eddison, bill@daleeddison.co.uk - Usual quiet pre Christmas market conditions. Activity is being held back by a lack of new stock coming to the market.

Chris Clubley FRICS FAAV, Market Weighton, Clubleys, s.bateman@clubleys.com - The property market is still suffering from a shortage of stock so prices of properties on the market are remaining strong. We have experienced people sitting on their hands a little during the immediate run up to Christmas.

Christopher Richard Jowett BSc MRICS, Huddersfield, Jowett Chartered Surveyors, 01484 536799, www.jowett-huddersfield.co.uk, chris@jowett-huddersfield.co.uk - December seasonally quieter than other months. Latent demand will come to fruition eventually when progress is made with Brexit.

Ian Adams MRICS, Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - Local agents are predicting a better year for 2018 with signs of better confidence returning to the housing market.

James Brown MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - Waiting to see whether the New Year market picks up as it usually does.

James Stanhope, Grimsby, Jackson Green & Preston, james.stanhope@jacksongreenpreston.co.uk - The 3% second homes stamp duty is having a huge impact on the buy to let market which was a large proportion of our sales at the lower end.

John E Haigh MRICS FAAV, Knaresborough, Lister Haigh (Knaresborough) Limited, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk - Quiet now for the festive season. We wait to see what the New Year brings.

John Reeves FRICS, York, Helmsley Group, 01904682800, john-reeves@helmsley.co.uk - It's stable, not exciting, but okay.

Kenneth Bird MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - Quiet December but sales on par with last year.

Kevin Smethurst FRICS, Selby, Kevin C Smethurst, 07814831966, kcsmethurst@gmail.com - The very unsettling national and international climate together with Brexit is making vendors wary of moving. This has resulted in a scarcity of property for sale and hence a slight increase in values.

Luke Whitaker BSc (Hons) MRICS, Leeds and Wakefield, Valuation Surveyors, 0800 083 400, www.valuation.com, luke.whitaker@valuation.com - Slow start to the year as usual but sales prices close to the asking prices still being achieved. Demand starting to vastly outstrip supply in areas.

M J Hunter MRICS, Doncaster, Grice and Hunter, 01302 360141, www.gricehunter.co.uk, griceandhunter@btconnect.com - For the industry as a whole (and this has been threatening for some time) you are now starting to see the closure of branches and/or relocation to out of town sites. As usual December has been a very quiet month.

Pete Shield FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Sales are still being achieved but the market is sluggish in the run up to the Christmas holiday period.

Peter Atkinson AssocRICS, York, Rhw Developments, pete@rhwdevelopments.co.uk - Brexit remains a shadow of uncertainty; over the short term the lack of development land supply remains a key issue helping to stabilise prices. Overall, economic uncertainty is having a negative impact on prices except at the very top of the market

Peter Green, Halifax, Brearley-Greens, 01422 330088 - With effect from 23 Dec to 3 Jan, the market closes down. The rest of January sees movement return but is dependent on the severity of winter weather.

Richard J Graves FRICS, Bridlington, D. Dunk, Lewis & Graves, richardgraves@btconnect.com - Demand remains good but too few properties coming to market.

William Marshall, Leeds, Adair Paxton, 0113 205 4190, william@adairpaxton.co.uk - Online companies bringing high street fees down but people still want high street services.

## North West

Derek Coates MRICS, Liverpool, Venmore, 0151 236 0301, www.venmores.co.uk, d.coates@venmores.co.uk - A quiet month which was only to be expected. A worsening political climate coupled with a number of adverse media articles does not bode well for the New Year.

Ian Macklin FRICS, Hale Hale Barns Timperley, Ian Macklin & Company, 0161 980 8011, www.ianmacklin.com, halebarns@ianmacklin.com - Enquiries were low before Christmas but surprisingly active between Christmas and New Year.



## Surveyor comments - sales

J F Halman MRICS, Wilmslow, Gascoigne Halman, 01625 460 344, [www.gascoignehalman.co.uk](http://www.gascoignehalman.co.uk), [jane@gascoignehalman.co.uk](mailto:jane@gascoignehalman.co.uk) - Dec 2017 marginally better than Dec 2016. Demand remains strong for all but the top end of the market.

John Williams FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 0151 343 9060, [www.b-a-o.com](http://www.b-a-o.com), [john@b-a-o.com](mailto:john@b-a-o.com) - December proved to be typically slow whilst a lack of new instructions coming to market threatens to set the mood for 2018.

Mark Elliott MRICS, Northwich, Elliott Consultants Ltd, 0160677056, [www.elliottconsultants.co.uk](http://www.elliottconsultants.co.uk), [mark@elliottconsultants.co.uk](mailto:mark@elliottconsultants.co.uk) - Very little property coming to the market. A lot of new build in the area.

Richard Powell FRICS, Oldham, Ryder & Dutton, 0161 925 3232, [www.ryder-dutton.co.uk](http://www.ryder-dutton.co.uk), [rpowell@ryder-dutton.co.uk](mailto:rpowell@ryder-dutton.co.uk) - The stamp duty changes didn't seem to have an immediate effect so we will have to see what happens in the early part of 2018. Stock levels very low.

### East Midlands

Andrew York FRICS, Leicester, Moore & York Ltd, 0116 2558666, [www.mooreandyork.co.uk](http://www.mooreandyork.co.uk), [andrew.york@mooreandyork.co.uk](mailto:andrew.york@mooreandyork.co.uk) - Bad weather affected enquiry levels in December.

Chris Beeby DipREA FNAEA MARLA AssocRICS, Thrapston, Bletsoes, 01832 732188, [bletsoes.co.uk](http://www.bletsoes.co.uk), [chris.beeby@bletsoes.co.uk](mailto:chris.beeby@bletsoes.co.uk) - Continued lack of fresh instructions and stock.

Chris Charlton FRICS, Nottingham, Savills, 01159348020, [www.savills.com](http://www.savills.com), [ccharlton@savills.com](mailto:ccharlton@savills.com) - A slow end to an even slower year. Lack of stock is likely to dampen the 2018 market with little sign of change in the near future.

Christopher Shallice FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - Relatively low level enquiries in the lead up to Christmas.

David Hammond BSc FRICS, Nottinghamshire, David Hammond Estate Agents, 01773 767776, [residential@dvdhammond.co.uk](mailto:residential@dvdhammond.co.uk), [dvdhammond.co.uk](mailto:dvdhammond.co.uk) - Activity quiet leading up to Xmas. Showing increased levels post Xmas. Still interest in well priced properties.

David Hawke FRICS, Worksop, David Hawke & Co, 01909 531450 - The usual subdued market as we approached Christmas was more evident than ever. Activity exceptionally low - let's hope for some lift in the New Year.

Mark Newton FRICS, Grantham, Newton Fallowell, 01476 591900, [www.newtonfallowell.co.uk](http://www.newtonfallowell.co.uk), [mark.newton@newtonfallowell.co.uk](mailto:mark.newton@newtonfallowell.co.uk) - December ended what was a good year with a 20% increase in exchanges but a depleted pipeline and instructions thin on the ground. 2018 looks a little daunting.

Martin Pendered FRICS, Wellingborough, Martin Pendered & Co Ltd, 01933 228822, [www.martinpendered.co.uk](http://www.martinpendered.co.uk), [mpendered@martinpendered.co.uk](mailto:mpendered@martinpendered.co.uk) - December is usually quiet but this year showed increased activity on sales but fewer instructions. There is concern that the pattern of lack of instructions will continue to affect the market in 2018 which will lead to price rises.

Paul Perriam BSc (Hons) MRICS, Nottingham, William H Brown/Bagshaws Residential, 01332 542299, [www.sequencehome.co.uk](http://www.sequencehome.co.uk), [paul.perriam@sequencehome.co.uk](mailto:paul.perriam@sequencehome.co.uk) - Instructions and sales activity ahead of last December.

Peter Buckingham, Market Harborough, Andrew Granger & Co, 01858 431315, [www.andrewgranger.co.uk](http://www.andrewgranger.co.uk), [peter.buckingham@andrewgranger.co.uk](mailto:peter.buckingham@andrewgranger.co.uk) - Economic and political uncertainty is causing home owners to stay put at present, but in actual fact, properties are selling well at good prices. Stock levels are low across the market, but sales are good.

Quentin Jackson-Stops FRICS, Northampton, Jackson-Stops, 01604 632991, [quentin.jackson-stops@jackson-stops.co.uk](mailto:quentin.jackson-stops@jackson-stops.co.uk) - December proved unusually busy in the run up to Christmas. Looking ahead we are hoping for new instructions to pick up strongly in January.

Roderic Turner FRICS, Skegness, Turner Evans Stevens, [roderic.turner@tes-property.co.uk](mailto:roderic.turner@tes-property.co.uk) - General economic uncertainty.

Simon Demery MRICS, Louth, Masons, 01507 350500, [www.masons-surveyors.co.uk](http://www.masons-surveyors.co.uk), [sd@masons-surveyors.co.uk](mailto:sd@masons-surveyors.co.uk) - Media reporting of Brexit process, global politics and the effects on consumer confidence. Social media, retail marketing and entertainment methods causing lifestyle changes.

Stephen Gadsby BSc FRICS, Derby, Gadsby Nichols, 01332 296396, [www.gadsbynichols.co.uk](http://www.gadsbynichols.co.uk), [stevegadsby@gadsbynichols.co.uk](mailto:stevegadsby@gadsbynichols.co.uk) - Usual seasonal downturn in enquiry levels, instructions and sales. Very little impact as a result of stamp duty changes but too soon to tell due to time of year.

### West Midlands

Andrew Grant FRICS, Worcester, Andrew Grant LLP, [dcss@andrew-grant.co.uk](mailto:dcss@andrew-grant.co.uk) - A shortage of property entering the market continues to create stagnation.

Colin Townsend MRICS, Malvern, John Goodwin, 01684 892809, [www.johngoodwin.co.uk](http://www.johngoodwin.co.uk), [colin@johngoodwin.co.uk](mailto:colin@johngoodwin.co.uk) - As one might expect, a quiet month. However we also noticed that more sales fell through due to chains breaking down, a trend that has appeared over the last few weeks.

J J Dell MRICS FAAV, Oswestry, J J Dell & Co, 01691 653437, [www.jjdell.co.uk](http://www.jjdell.co.uk), [property@jjdell.co.uk](mailto:property@jjdell.co.uk) - Instructions are low due to time of year, shortage of properties for awaited buyers. Buyers going into rental properties as they cannot find properties of their choice.

Jennifer Price FRICS, Birmingham, Harrison Price Homes, [jennifer@harrisonpricehomes.co.uk](mailto:jennifer@harrisonpricehomes.co.uk) - Very little on the market.

John Andrews FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Lower volumes of property coming for sale is consistent with the build up to Christmas. Lower levels of enquiry but this is expected to increase in January when more property comes for sale.

John Andrews FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Last month saw lower levels of new instructions and generally a quietening off in enquiries. This follows the usual pattern before Christmas and January is expected to see normal levels of both new instructions and enquiries.

John Andrews FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - Quieter months as would be expected in the run-up to Christmas. Reduced number of instructions resulted in lower levels of enquiry. January should see an improvement.

John Andrews FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Much fewer new instructions over the last month. Lack of new properties has affected levels of enquiry, but this often happens in the build up to Christmas.

Mike Arthan FRICS, Shropshire, Barbers, [m.athan@barbers-online.co.uk](mailto:m.athan@barbers-online.co.uk) - Reasonable December sales activity means that replacement new stock is needed early in the New Year to stimulate general market activity.

Richard Franklin BSc MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436, [richard@franklingallimore.com](mailto:richard@franklingallimore.com) - Demand is still outstripping supply with few new listings across the market. Thus, any discount to asking price has reduced.

### East Anglia

## Surveyor comments - sales

Andrew Wagstaff MRICS, Burnham Market-North Norfolk, Bedfords, andrewwagstaff@bedfords.co.uk - A predictable December in terms of low volume of valuation appointments but a pleasing level of sales for no apparent reason.

David H Knights MRICS, Ipswich, David Brown & Co., 01473 222266, www.davidbrown-ipswich.co.uk, mail@davidbrown-ipswich.co.uk - After a traditionally quiet month we anticipate pent-up demand will result in greater activity both in terms of instructions and sales.

Ed Russell, Bury St Edmunds, Jackson-Stops & Staff, 01638 662231, ed.russell@jackson-stops.co.uk - Activity picked up in advance of the Christmas break. Hoping this is delayed decisions from earlier in the year feeding through.

Jeffrey Hazek FRICS, Kings Lynn, Geoffrey Collins & Co., 01553 774135 - Usual Christmas slowdown but still a steady demand to purchase.

Mark Wood MRICS, Cambridge, Carter Jonas, 01223 403330, www.carterjonas.co.uk, mark.wood@carterjonas.co.uk - Quiet market as expected during December.

Nigel Steele FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - Busy right up to Christmas this year. Now waiting for the new buyers to get going in the New Year.

Rob Swiney MRICS, Bury St Edmunds, Lacy Scott and Knight, 01284 748600, www.lsk.co.uk, rswiney@lsk.co.uk - Market started well lets just see where the next few months take us.

### South East

Anthony Webb FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Properties over £850,000 have stagnated in the market influenced by excessive Stamp Duty levels above this point creating a ripple effect throughout all price ranges.

David Nesbit FRICS, Portsmouth, D.M.Nesbit & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - A very quiet December will be reflected in year end stats. 2017 passes with much talk but little action to stir the market. Lack of confidence and a severe shortage of supply does not promise well for 2018.

David Parish FRICS, Upminster, Gates & Parish, 01708 250033, professional@gates-parish.co.uk - The market has been quiet due to a lack of instructions.

Donald Leslie MRICS, Amersham, Donald Leslie & Co., 01494 722006, www.donaldleslie.co.uk, donald@donaldleslie.co.uk - Subdued market conditions in all sectors. Discounting of more than 10% to asking prices typical in the £1m plus bracket.

Edward Rook MRICS, Sevenoaks, Knight Frank, edward.rook@knightfrank.com - Stamp duty still prohibiting people from moving.

Guy Kissick-Jones MRICS, Witney, Leys Longden and Co, guy@leyslongden.co.uk - Snow and Christmas holidays has slowed the market during December.

Ian Perry FRICS, Cheltenham Cirencester Nailsworth Stroud Tetbury Fairford Faringdon Highworth Witney Lechlade, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - New instructions tailed off at the yearend but we are positive for the New Year.

Joe Arnold MRICS Registered Valuer, Croydon, Arnold & Baldwin Chartered Surveyors, 02086422999, www.arnoldandbaldwin.co.uk, joe@arnoldandbaldwin.co.uk - Brexit is still uncertain. Uncertainty leads to inactivity. The lack of stock and activity will remain in balance for the year. Until we know the Brexit deal, the market will stumble along. Uncertain of job security, so stay put.

John Frost MRICS, Ashford, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Very quiet as expected for December. Stamp duty change for first time buyers did not produce many new applicants. Hopefully they will start looking now we are in 2018, but pricing will be crucial.

John Frost MRICS, Beaconsfield, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - The market in Beaconsfield is starting to adjust in respect to strong prices and offers are still coming in at prices lower than clients have expected.

John Frost MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - The market supply of stock has very little moves of aspiration. Those that exist are priced too high. The quality and quantity of stock is not sustainable for the current number of agents in the second hand market.

John Frost MRICS, Langley, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Lack of stock, there is interest only in well priced stock.

John Frost MRICS, Slough, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Good instructions but lack of confidence and poor quality buyers.

John Frost MRICS, Windsor, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Stamp duty still causing poor sales volumes.

Mark Everett FRICS, Epsom, Michael Everett & Company, markeverett@michael-everett.co.uk - A surprisingly strong end to the year in terms of both sales and valuations. Hopefully this will kick off 2018 with much more enthusiasm than 2017.

Martin Allen MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - One of our quietest Decembers for years but at least the approach of Christmas concentrated the minds of purchasers and their advisors, so long delayed sales were finally exchanged and completed.

Michael Brooker FRICS, Crowborough East Sussex, Michael Brooker, 01892-663377, sales@michaelbrooker.co.uk - Lack of fresh instructions across the board. Confidence required. In uncertain times, inaction will prevail.

Philip Hiatt MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, www.your-move.co.uk/eastgrinstead, philip.hiatt@your-move.co.uk - Seasonally quiet and snowy weather also had an impact. Stamp duty change for FTB's so far has had little impact.

Tim Green MRICS, South Oxfordshire, Green & Co., 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - Buyer activity has continued at higher levels than expected, now only interrupted by the Christmas distractions. The SDLT changes for FTBs have pushed up prices in that range so now passed the benefit to first time sellers.

# Surveyor comments - sales

## South West

Christopher Bailey MRICS, Exeter, Knight Frank, christopher.bailey@knightfrank.com - The winter period has been busier this year compared to previous years. The Exeter City market is particularly active as buyers relocate to the SW from London and the SE.

David Lewis BSc hons, West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk - Turnover is up on the previous year probably because of growth of market share rather than the market. The number of instructions appears to be growing, I hope it doesn't dilute demand too much.

David Mckillop FRICS, Salisbury, Mckillop and Gregory, dm@mckillopandgregory.co.uk - A much better month than I had expected. Sales and instructions were good and a large number of exchanges before the Christmas break.

G C Thorne FRICS, East Dorset, Thorne/Fisk, 01202-684004, www.thornes.org.uk, graham@thornes.org.uk - We have not seen much activity yet from the stamp duty change but it may be too early to realise any change. The market remains firm but dependent on the price quoted.

Ian Perry FRICS, Cheltenham Cirencester Nailsworth Stroud Tetbury, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - New instructions tailed off at the year end but positive for the New year.

James Mckillop MRICS, South West region, Knight Frank, james.mckillop@knightfrank.com - Viewing levels were down but the buyers were more serious, braving the wet weather with purpose. Some good momentum to take into the New Year.

James Wilson MRICS, Shaftesbury, Jackson Stops, 01747 850858, jackson-stops.co.uk, james.wilson@jackson-stops.co.uk - December was surprisingly busy but sales are taking longer to conclude.

Jeff Cole MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - A typical December with low levels of activity apart from people making plans for the New Year & some pre Christmas completions. We expect January to be busier.

Jeremy Priestley FRICS, Poole, Berekeleys, 01202 708383, www.berkeleys.com, jeremy.priestley@yogroup.co.uk - The New Year has seen an increase in both buyer and vendor activity. However, there continues to be an overhang of over-priced stock in the upper price ranges, alongside (or because of?) SDLT, government and interest rate uncertainty etc.

John Corben FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - The market slowed down towards the end of the year. There is still a shortage of decent properties for sale and as a consequence prices are holding firm.

Julian Bunkall FRICS, Dorchester, Jackson-Stops & Staff, 07970 872974, julian.bunkall@jackson-stops.co.uk - December is always a slow period in the run up to Christmas. November and early December were very quiet but latter part of December was surprisingly active.

Mark A K Lewis FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - The December lull came earlier than we expected and buyers are not necessarily focused at the moment. Government challenges and negative reporting about the economy is making people uneasy.

Mark Annett FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - Given the Christmas season, buyer enquiries have held up well and we have been busy.

Martyn Venner MRICS, Taunton, GTH, martyn.venner@gth.net - Over the Christmas period, enquires have dropped dramatically. Instructions have slowed and many vendors have removed their property from the internet for the festive period.

Matthew Harvey MRICS, Bourton-On-The-Water, Tayler & Fletcher, 01451820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - A busy late autumn market has faded into the usual Xmas lull. However some good new instructions, but volume down on last year.

O F Miles FRICS, Swanage, Oliver Miles, 01929 426655, www.olivermiles.co.uk, olivermiles@olivermiles.co.uk - Dearth of properties keeping prices up, although top end prices, i.e £750,000 + are possibly receding.

Robert Cooney FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230230, robertcooney.co.uk, robert.cooney@robertcooney.co.uk - December was a lot less active than October and November, which had been two of the best months of the year for sales and instructions.

Robert Dickinson MRICS, Torquay, Irvine Nott, 01803295433, www.irvinenott.co.uk, rob@irvinenott.co.uk - Christmas seasonal.

Roger Punch FRICS, South Devon, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - While the supply of fresh instructions remains low there are increasing numbers of upper mid-range buyers emerging for second homes in prime locations.

Simon Barker MRICS, Sherborne, Dorset, Knight Frank LLP, simon.barker@knightfrank.com - Lack of good stock is keeping prices higher. Activity has started strongly so far in January.

Simon Cooper FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - December was a surprisingly good month and dramatically better than 12 months ago. It amazes me that much of the press is so negative about the market, the Exeter area is far from subdued.

## Wales

Andrew Morgan FRICS FAAV, Lampeter, Morgan and Davies, 01570423623, morgananddavies.co.uk, lampeter@morgananddavies.co.uk - A busy autumn continued the trend through to Christmas. Good levels of activity through all categories.

Anthony Filice FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Quiet in run up to Christmas, however busy re-start after Boxing Day, with viewings, valuations and offers. General shortage of properties is maintaining values. First time buyers coming into the market, should maintain the momentum of the busy start

David E Baker FRICS, Penarth, David Bakers Co Ltd, 02920 702622, liz@davidbaker.co.uk - As expected fairly quiet on all fronts. I think the market will pick-up quickly after Christmas because the Welsh Assembly are increasing Stamp Duty in April and buyers will want to complete before then.

David James FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - December has seen plenty of completions although sales agreed are down.

John Caines FRICS, Bridgend Port Talbot Neath, Payton Jewell Caines, 01656654328, www.pjchomes.co.uk, john.caines@pjchomes.co.uk - A bright start but a little early to judge how the market will perform in the first quarter.



## Surveyor comments - sales

Paul Lucas FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - The market is completely flat as we approach Christmas which is directly opposite to the activity experienced at the same time last year.

### London

Allan Fuller FRICS, Putney, Allan Fuller Estate Agents, 02087888822, alan.fuller.co.uk, allan@allanfuller.co.uk - Flat sales in the lower price ranges of up to £500k were active, the higher price ranges and housing sales were slow. December is always a quiet month but we have been encouraged by higher enquiry levels since Jan 2.

Alun Jones MRICS, Knightsbridge, Marler & Marler, 0207235 9641 - Activity levels remain very low, not helped by the uncertainty of Brexit negotiations.

Benjamin Mire, London NW9, Trust Property Management, 02083586543, www.trustplc.com, bmire@trustplc.com - Save for the usual Xmas/New Year seasonal slowdown, the market remains buoyant.

Christopher Ames MRICS, Belgravia, London SW1, Ames Belgravia Ltd, 020 7730 1155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - There was a flurry of activity and more sales agreed in the last two months of 2017 with vendors and purchasers wishing to conclude their moving plans by year's end. Investor and developer purchases remain quiet.

James Gubbins MRICS, Pimlico, Dauntons, 020 78348000, www.dauntons.co.uk, mail@dauntons.co.uk - We are in the seasonally quiet holiday period. The effects of Brexit continue to weigh heavily on the London market.

James Perris MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Christmas period quiet as expected however market is beginning to stabilise with agents reporting positive feedback and interest increasing. Upper tiers still suffering due to transaction costs.

Jeremy Leaf FRICS, Finchley, Jeremy Leaf & Co, jeremy - We noticed a fairly slow end to 2017 probably for seasonal reasons. On the other hand, plenty of valuation requests give us cause for optimism. We've seen no signs of a price collapse but vendors' flexibility is essential if sales are to be agreed

John J King FRICS, Merton L.B., Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Main activity has come from Help to Buy schemes, otherwise very little new business heading towards Xmas.

John J.King FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Predictably a quieter month for instructions and new registrations although an upturn on Help to Buy sector. Most vendors have already reduced asking prices, difficult to envisage further reductions other than those caused by interest rate increases.

Michael Pennie MRICS, Dagenham, P and A Design Consultants Ltd, 0208 595 6070, padesignconsultants@sky.com - Brexit leavers.

Simon Aldous MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - House prices across prime London continue to fall. In the central market, there are signs that values may be bottoming out having seen 3 years of falls.

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

### Scotland

Adrian Stott FRICS, Lothians, J and E Shepherd, 01316533456, shepherd.co.uk, a.stott@shepherd.co.uk - Continued uncertainty re macroeconomic factors filters down to local levels with possible increases in interest rates seeming to have led to higher remortgage instructions.

Andrew Hitchen BSc MRICS, Stirling, Shepherd Surveyors, andrew.hitchen@shepherd.co.uk - As expected, winter period has seen lower number of new vendor instructions, however, there is still strong demand for family homes. Hopeful of increased activity early 2018.

Chris Hall MRICS, Edinburgh, Rettie and Co, 0131 220 4160, www.rettie.co.uk, chris.hall@rettie.co.uk - Market still very stratified across value bands and locations. Higher value market north of £500k still restricted due to LBTT rates and ADS.

David Corrie MRICS, Castle Douglas, Galbraith, 01556 505 003, www.galbraithgroup.com, david.corrie@galbraithgroup.com - Buyers from the South continue to flock to Dumfries & Galloway, recognising the difference in value and lifestyle.

Eric H Curran FRICS, Glasgow, Dm Hall LLP, 0141 332 8615, www.dmhall.co.uk, www.dmhall.co.uk - Scottish property continues to perform with micro markets within regions. In the main, a limited supply of property is still a market issue. There is a potential for market reactions as the shape of Brexit becomes clearer.

Gordon Macdonald FRICS, Aberdeen & Aberdeenshire, Allied Surveyors Scotland, 01224571163, gordon.macdonald@alliedsurveyorsscotland.com - Stamp duty has a very negative impact in most market sectors.

Graeme Gilchrist MRICS, Dundee, Graham + Sibbald, 01382 2000564, www.g-s.co.uk, graeme.gilchrist@g-s.co.uk - The Tayside area continues to feel the effects of a lack of stock on the market which is driving property prices upwards. It is generally expected that this trend will continue through 2018.

Grant Robertson MRICS, Glasgow, Allied Surveyors, 01413309950, grant.robertson@alliedsurveyorsscotland.com - Very limited stock and values held up well through November and December against market expectation of drops. What was on the market held well.

H Lukas MRICS, Scottish Borders, Galbraith, 01896754842, www.galbraithgroup.com, harry.lukas@galbraithgroup.com - LBTT an issue with higher value property.

Ian Morton MRICS, St Andrews, Bradburne & Co, 01334 479479, www.bradburne.co.uk, info@bradburne.co.uk - Sales market is slow due to festive period although preparation is underway for sales in new year.

James Burns MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, jburns@g-s.co.uk - The lack of available stock in the market has led to relatively strong demand and good sales prices being achieved. The early part of 2018 could be seen as an opportunity to take advantage of this current demand and prices being paid.

John Brown FRICS, Scotland, John Brown and Company, 07768583919, jb-uk.com, john.brown@jb-uk.com - Scotland has LBTT, the slight increase in rate base will help when applied. However the first time buyer market is still distorted by investor demand. Market good in major employment areas but still patchy in country regions. Edinburgh strong market.

Kevin Hay BSc MRICS, Ayr, Allied Surveyors, 01292 265381, kevin.hay@alliedsurveyorsscotland.com - Limited stock coming to the market in the runup to Christmas.

## Surveyor comments - sales

Marion Currie AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, [www.galbraithgroup.com](http://www.galbraithgroup.com), [marion.currie@galbraithgroup.com](mailto:marion.currie@galbraithgroup.com) - Seasonal lull in instructions as expected but still a good amount of viewing activity. High interest and closing date set on an unusual property, proving again that the quirky will sell here in D & G.

Peter Drennan BSc MRICS, Edinburgh, Allied Surveyors Scotland., 0131 226 6518, [peter.drennan@alliedsurveyorsscotland.com](mailto:peter.drennan@alliedsurveyorsscotland.com) - Market has yet to wake up properly, though expectation is that dearth of supply means prices will increase for all but the top end of the market, which has still to resolve tax change issues.

Scott Holley Trainee, Perthshire, Galbraith, [scott.holley@galbraithgroup.com](mailto:scott.holley@galbraithgroup.com) - An increasing number of families are moving to the area due to demand for schools. Rural property with land remains very popular. Presentation remains key to securing viewings and offers.

Thomas Baird MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, [www.selectsurveyors.co.uk](http://www.selectsurveyors.co.uk), [reception@selectsurveyors.co.uk](mailto:reception@selectsurveyors.co.uk) - Market is still struggling with the low stock levels. Hopefully we will see an increase in 2018.

Tom Murray AssocRICS and RICS Registered Valuer, South Ayrshire, Galloway & Ayrshire Properties, 01465 713498, [www.gapinthemarket.com](http://www.gapinthemarket.com), [tom.murray@gapinthemarket.com](mailto:tom.murray@gapinthemarket.com) - As 2017 drew to an end the market in this area remained as active as it had been all year. Instructions, viewings and general enquiries showing no signs of any seasonal slowdown. January 2018 has picked up where we left off. Good start.

### Northern Ireland

Eoin Doherty MRICS, Londonderry, James O'Doherty & Co., [eoindoherty@hotmail.com](mailto:eoindoherty@hotmail.com) - Expected rise in interest rates shall have a slowing effect on sales this year (expected).

Gareth J Gibson FRICS, Belfast, Douglas Huston LLP, 02890683711, [www.douglashuston.com](http://www.douglashuston.com), [gareth@hustonestateagents.com](mailto:gareth@hustonestateagents.com) - The whole of 2017 was blighted by a shortage of supply and a slowing of new enquiries towards the end of the year. This looks set to continue into 2018.

Kirby O'Connor AssocRICS, Belfast, GOC Estate Agents, 02890662366, [www.gocestateagents.com](http://www.gocestateagents.com), [kirby@gocestateagents.com](mailto:kirby@gocestateagents.com) - We found the market unseasonably busy, we had a lot of investment enquiries before Christmas and house sales leading to bidding. The market was a lot stronger than 2016.

Samuel Dickey MRICS, Belfast, Simon Brien Residential, 02890595555, [www.simonbrien.com](http://www.simonbrien.com), [sdickey@simonbrien.com](mailto:sdickey@simonbrien.com) - The market slows at Christmas but has ended 2017 in positive territory with sales growth and activity expected to increase in 2018.

Stephen Fitzpatrick MRICS, Newry, Stephen Fitzpatrick Estd.1881, 02830265533, [www.stephenfitzpatrick.co.uk](http://www.stephenfitzpatrick.co.uk), [info@stephenfitzpatrick.co.uk](mailto:info@stephenfitzpatrick.co.uk) - Increased cost of building materials will in turn increase the price of new builds. Interest rates are always a factor.

# Surveyor comments - lettings

## North

Neil S Foster Bsc (Hons) MRICS, Newcastle upon Tyne, Foster Maddison Property Consultants, neil.foster@fostermaddison.co.uk - 2018-19 student rental season is nearly complete and showing a healthy increase on average rents from the previous year. Demand is also improved at all levels.

T H Brannen FRICS, Coast / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Too much meddling by the Government in 2018 is going to affect the market as a whole.

## Yorkshire & Humberside

Alex Mcneil MRICS, Huddersfield, Bramleys, 01484 530361, alexmcneil@bramleys1.co.uk - There remains strong tenant demand and rent levels likely to be sustained or increased, particularly in the more desirable areas where there is a shortage of housing available to rent.

Ben Hudson MRICS, York, Hudson Moody, 01904 650650, benhudson@hudson-moody.com - Lack of property to rent fuelling rent increases.

Chris Clubley FRICS FAAV, Market Weighton, Clubleys, s.bateman@clubleys.com - Activity on the lettings side of things was high with tenants looking to be moved in for Christmas.

Christopher Richard Jowett BSc MRICS, Huddersfield, Jowett Chartered Surveyors, 01484 536799, www.jowett-huddersfield.co.uk, chris@jowett-huddersfield.co.uk - There has been consistent tenant demand over the last decade. This should continue unless the Government and national/ social house builders buck the trend and increase supply for new homes.

Ian Adams MRICS, Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - Supply and demand in balance generally with expected increase in demand for 2018. This is helped by the recent statement that EU residents here or arriving prior to final Brexit will have the right to remain.

John Reeves FRICS, York, Helmsley Group, 01904682800, john-reeves@helmsley.co.uk - Very busy.

Pete Shield FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Still a steady market for well presented properties of all kinds.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - The lettings market is also adversely affected by seasonal patterns but not to the same severity as the sales market.

## North West

Ian Macklin FRICS, Hale Hale Barns Timperley, Ian Macklin & Company, 0161 980 8011, www.ianmacklin.com, halebarns@ianmacklin.com - Reduced activity and instructions but more activity anticipated.

J F Halman MRICS, Wilmslow, Gascoigne Halman, 01625 460 344, www.gascoignealman.co.uk, jane@gascoignealman.co.uk - Difficult market conditions, lower fees, difficult to get new instructions. Landlords are not motivated to expand portfolio at present due to rents stabilising and costs of being a landlord.

## East Midlands

Andrew York FRICS, Leicester, Moore & York Ltd, 0116 2558666, www.mooreandyork.co.uk, andrew.york@mooreandyork.co.uk - Tenant demand still very strong.

Chris Beeby DipREA FNAEA MARLA AssocRICS, Thrapston, Bletsoes, 01832 732188, bletsoes.co.uk, chris.beeby@bletsoes.co.uk - Lack of fresh instructions helping to force up rental prices.

Christopher Shallice FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - Demand remains at a satisfactory level.

David Hammond BSc FRICS, Nottinghamshire, David Hammond Estate Agents, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - We continue to see strong demand for good available rental stock. Notwithstanding the time of year and other factors namely 'Brexit'.

John Chappell MRICS, Skegness, Property Office, 01754 763520 - Steady demand subject to usual seasonal fluctuations in a coastal resort.

Martin Pendered FRICS, Wellingborough, Martin Pendered & Co Ltd, 01933 228822, www.martinpendered.co.uk, mpendered@martinpendered.co.uk - Landlords still see property as a sensible investment and existing landlords are still buying. Demand from tenants has been slightly slower but good quality property continues to let well.

Nicholas Richardson FRICS, Beeston, Nottingham, Nicholas Richardsons, 01159677589, www.nicric.co.uk, nrichardson@nicric.co.uk - Ourselves & other local letting agents have less houses available, which could be Xmas effect & grotty weather, but my biggest landlords say they are holding back on more buy to lets.

Peter Buckingham, Market Harborough, Andrew Granger & Co, 01858 431315, www.andrewgranger.co.uk, peter.buckingham@andrewgranger.co.uk - Tenant fee ban will have an effect on market rents, in addition to which minimum energy efficiency standards will also have an effect on certain properties. Otherwise, the lettings market is buoyant.

Roderic Turner FRICS, Skegness, Turner Evans Stevens, roderic.turner@tes-property.co.uk - Government measures and intentions causing great uncertainty.

Simon Demery MRICS, Louth, Masons, 01507 350500, www.masons-surveyors.co.uk, sd@masons-surveyors.co.uk - Affordability, cost of living, job security, social media and lifestyle changes resulting in less disposable income after perceived financial commitments.

## West Midlands

Andrew Grant FRICS, Worcester, Andrew Grant LLP, dcsc@andrew-grant.co.uk - A balanced market of supply to demand.

Colin Townsend MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A quieter month. Still a shortage of new instructions. Rents will rise in 2018.

Dean Taylor MRICS, Harborne/ Birmingham, J P Taylor Chartered Surveyors, 0121 4284333, www.jptaylor.co.uk, office@jptaylor.co.uk - Still relatively busy with tenant enquiries, however we did see our usual slow down as we approached Christmas.

J J Dell MRICS FAAV, Oswestry, J J Dell & Co, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - A shortage of instructions and tenants.

Jennifer Price FRICS, Birmingham, Harrison Price Homes, jennifer@harrisonpricehomes.co.uk - Tenant demand very slow in the month before Christmas but one or two late enquiries in the last week.

John Andrews FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Demand for all types of rented accommodation continues despite there being lower new instructions. Existing properties letting well.

John Andrews FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Demand for family properties exceeding supply. Smaller flats letting well. More instructions needed to satisfy demand.

# Surveyor comments - lettings

John Andrews FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Constant steady demand for all types of property throughout the area. Rents increasing gradually but still affordable.

John Andrews FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - A busy month as demand for good quality rented accommodation continues. Shortage of new landlord instructions and existing properties available letting well.

Mike Arthan FRICS, Shropshire, Barbers, m.athan@barbers-online.co.uk - A fairly well balanced local lettings market.

Nick Lamb MRICS, Midlands, Naismiths, 0121262 3450, www.naismiths.com, nicholas.lamb@naismiths.com - Demand remains high for new good quality properties. Increasing demand in suburban areas for 1 bed properties experienced, but the 3 bed family market is particularly active.

Richard Franklin BSc MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436, richard@franklingallimore.com - Great concern over clarity of impact Minimum Energy Efficiency Standards in April. The market needs this issue like a hole in the head at present.

Stephen Barber, Stafford, Bridgfords, 01785 212112, stephen.barber@bridgfordscountrywide.co.uk - Been really busy since Christmas I am pleased to say.

## East Anglia

Jeffrey Hazek FRICS, Kings Lynn, Geoffrey Collins & Co., 01553 774135 - Steady supply and demand.

Nigel Steele FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, 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, twebb@trenchard-arlidge.co.uk - Fewer tenants but rental levels steady.

David Parish FRICS, Upminster, Gates & Parish, 01708 250033, professional@gates-parish.co.uk - A higher level of activity has been experienced which is unusual at this time of year. The demand at the present time is good.

Joe Arnold MRICS Registered Valuer, Croydon, Arnold & Baldwin Chartered Surveyors, 02086422999, www.arnoldandbaldwin.co.uk, joe@arnoldandbaldwin.co.uk - There hasn't been a mass selloff following significant intervention from government. But there hasn't been as much new take up either, particularly in London and the South East. Perhaps the lack of new supply may put pressure on rents.

John Frost MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Lack of stock with traditionally lower level of applicants in December.

John Frost MRICS, Slough, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Tax implications for landlords, Brexit and economic uncertainty, excessive taxation of landlords, uncertainty over withdrawal of fees to tenants, recent weather conditions.

Martin Allen MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - Lettings market not affected by the time of year but lack of stock still pushing prices up.

Michael Brooker FRICS, Crowborough East Sussex, Michael Brooker, 01892-663377, sales@michaelbrooker.co.uk - Steady market. Plenty of activity.

S B B Askaroff BSc MRICS, Eastbourne, Estatewise, 01323412010, estatewiselimited@gmail.com - Market remains competitive and many poor quality applicants.

Stuart Gray MRICS FAAV, St Albans, Strutt & Parker, 01727 840285, www.struttandparker.com, stuart.gray@struttandparker.com - A reasonably brisk market right up to the holiday season, likely a result of lack of supply.

Tom White MRICS, Saffron Walden, Audley End Estate, tom.white@audleyendestate.co.uk - Demand exceeds supply and good property lets briskly.

## South West

Mark A K Lewis FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - Too many tenants and not enough landlords.

Mark Annett FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - Demand remains very strong and rents have held up well.

Martyn Venner MRICS, Taunton, GTH, martyn.venner@gth.net - Lack of new stock, increase in tenant demand.

Matthew Harvey MRICS, Bourton-On-The-Water, Tayler & Fletcher, 01451820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - A significant rise in stock levels over the past month with supply exceeding demand for the first time in years. Lots of tenants moving in to new build affordable/shared equity out of the rental market.

Paul Oughton MARLA, MNAEA, Cirencester and Cotswolds, Moore Allen & Innocent LLP, 01285 648 118, www.mooreallen.co.uk, paul.oughton@mooreallen.co.uk - A quieter December than 2016 but appears to be more a pause than a stop.

Robert Dickinson MRICS, Torquay, Irvine Nott, 01803295433, www.irvinenott.co.uk, rob@irvinenott.co.uk - Christmas seasonal - market expected to remain strong.

Simon Cooper FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - Tenant demand for Exeter and the surrounding area remains most buoyant. More properties could readily be let. There is no sign of landlords vacating the market due to good yields and strong capital appreciation.

## Wales

Anthony Filice FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Noticeable slowdown in activity leading up to Christmas, but after Boxing Day, busy with valuations, viewings and lettings agreed. No sign of rental market slowing down, with rents holding up well and marginally increasing.

John Caines FRICS, Bridgend Port Talbot Neath, Payton Jewell Caines, 01656654328, www.pjchomes.co.uk, john.caines@pjchomes.co.uk - The impending ban on tenants fees is a real concern for maintaining service levels and already we are seeing landlords selling rather than re-letting. A totally ill-conceived piece of legislation, typical of government meddling.

Paul Lucas FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - There is some activity but in general the market is quieter than it has been for some months.

## London

Allan Fuller FRICS, Putney, Allan Fuller Estate Agents, 02087888822, alan.fuller.co.uk, allan@allanfuller.co.uk - We have agreed 48% more lettings than the same period of 2016, showing high demand levels in our area. Tenants are however looking for value and overpriced properties are not letting.

Alun Jones MRICS, Knightsbridge, Marler & Marler, 0207235 9641 - New tax changes may cause some landlords to re-evaluate portfolios, with a consequent reduction in stock.



# Surveyor comments - lettings

Angela Kelly MRICS, City and Clerkenwell, Hurford Salvi Carr Ltd, 02074901122, www.hurford-salvi-carr.co.uk, angela.kelly@h-s-c.co.uk - The central London market remains one of low growth and low transaction levels where renting is now good value compared with owning a property.

Benjamin Mire, London NW9, Trust Property Management, 02083586543, www.trustplc.com, bmire@trustplc.com - Save for the usual Xmas/New Year seasonal slowdown, the market remains buoyant.

James Gubbins MRICS, Pimlico, Dauntons, 020 78348000, www.dauntons.co.uk, mail@dauntons.co.uk - Still a lack of good applicants. Landlords are reducing prices but this is not stopping lengthy void periods due to a lack of tenants.

Jeremy Leaf FRICS, Finchley, Jeremy Leaf & Co, jeremy - Rents continued their slow downward path for us in 2017 (including December). More landlords, keen to reduce void periods, are recognising the changed landscape and reducing expectations. We have seen lower rents have prompted more tenant demand

Jilly Bland John Collard MRICS, Wimbledon Village, Robert Holmes & Co, 0208 879 9669, www.robertholmes.co.uk, jilly@robertholmes.co.uk - Excellent start to the year with high budgets and many viewings and offers accepted

John J King FRICS, Merton L.B., Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - The month overall has been a slow burn, very few registrations.

John J.King FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Generally a poorer month when expectations appeared better at the start of the month.

Mark Wilson MRICS, London, Globe Apartments, 020 7935 9512, www.globeapt.com, mark@globeapt.com - Our New Year optimism does not extend to the central London lettings market. We don't see what will bring the long awaited upturn.

Matt Bownik, London, Daniel Watney, 02030773400, www.danielwatney.co.uk, mbownik@danielwatney.co.uk - Decrease in EU tenants, outflow of German and French. Inflow of US workers, so overall balanced demand. Increase in demand for furnished flats.

Michael Pennie MRICS, Dagenham, P and A Design Consultants Ltd, 0208 595 6070, padesignconsultants@sky.com - Brexit leavers.

Simon Aldous MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - Prime London rents continue to fall, across outer London the falls are slightly less, but at the bottom end it is more resilient and also at the very high end where the market is active.

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

Will Barnes Yallowley AssocRICS, Kensington London, Lhh Residential LLP, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - Seasonally quiet.

## Scotland

Carolyn Davies MRICS, Dumfries, Savills, 01387 263066, www.savills.co.uk, cmdavies@savills.com - Ongoing demand for good quality property, remoter more basic property struggling to rent.

David Corrie MRICS, Castle Douglas, Galbraith, 01556 505 003, www.galbraithgroup.com, david.corrie@galbraithgroup.com - The market demands good quality well managed houses.

Fraser Crichton MRICS, Edinburgh, Dove Davies & Partners, 01312283999, www.dovedavies.com, fcrichton@dovedavies.com - There continues to be a shortage of quality flats to let in the city centre of Edinburgh. Those that do come on the market are in high demand.

Gordon Macdonald FRICS, Aberdeen & Aberdeenshire, Allied Surveyors Scotland, 01224571163, gordon.macdonald@alliedsurveyorsscotland.com - Oversupply continues to keep rents low.

Grant Robertson MRICS, Glasgow, Allied Surveyors, 01413309950, grant.robertson@alliedsurveyorsscotland.com - Lower demand and excess stock led to a damp squib of a month in the rental market.

Ian Morton MRICS, St Andrews, Bradburne & Co, 01334 479479, www.bradburne.co.uk, info@bradburne.co.uk - Tenant demand continues through festive period. New private residential tenancies in force but question mark over student tenancies due to no end date.

John Brown FRICS, Scotland, John Brown and Company, 07768583919, jb-uk.com, john.brown@jb-uk.com - Continued demand but more landlords are selling given tax and continued additional requirements of legislation. Rent controls etc. Reducing stock from smaller landlords.

Neil J Woodhead FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co - Very low stock level for this time of year.

## Northern Ireland

Gareth J Gibson FRICS, Belfast, Douglas Huston LLP, 02890683711, www.douglashuston.com, gareth@hustonestateagents.com - The local lettings market is traditionally very quiet until Easter when supply and demand will pick up.

Kirby O'Connor AssocRICS, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - Rental market very busy, quieter in December but we found a lot of our current leases were extending their leases over the Christmas period.

Samuel Dickey MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - The rental market will carry on strong momentum into 2018.

Stephen Fitzpatrick MRICS, Newry, Stephen Fitzpatrick Estd.1881, 02830265533, www.stephenfitzpatrick.co.uk, info@stephenfitzpatrick.co.uk - Unaffordable housing bolsters the letting market.

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