



July 2018: UK Residential Market Survey

Landlord instructions fall as rent forecasts edge up

- Lettings market data provides further evidence of the impact of tax changes on BLT supply
- Sales market remains broadly flat at headline level
- Sub £500k continues to show stronger trend as reflected in ask vs sales price gap

The most striking feature of the July 2018 RICS Residential Market Survey is the worsening trend in new instructions in the lettings sector. This was something that was highlighted in the June report on the basis of monthly non-seasonally adjusted data. However, a broadly similar pattern is visible in the preferred indicator (released at a quarterly frequency and seasonally adjusted).

The results show the New Landlord Instructions series in the latest three month period has slipped to a net balance of -22%. This is the eighth consecutive quarter in which this indicator has recorded a negative number, albeit only modestly so on some occasions. This pattern is symptomatic of the shift in the mood music in the Buy to Let market in the wake of tax changes which are still in the process of being implemented. Significantly, the drop in instructions is evident in virtually all parts of the country to a greater or lesser extent.

While the implication of this feedback is that the supply of fresh rental stock to the market is increasingly constrained, the Tenant Demand indicator remains resilient. The upward momentum in the latter appears to have slowed in recent quarters but the numbers remain in positive territory at a headline level (+4% in the latest three month period). One consequence of this imbalance is that expectations for rental growth appear to be strengthening once again. Over the next twelve month, rents are projected to increase by a little short of +2% nationally, but the shortfall in the supply pipeline is more visible over the medium term with a cumulative rise of around +15% (based on three month average of responses) expected by the middle of 2023. East Anglia and the South West are viewed as likely to see the sharpest growth over the period.

Turning to the sales market, the underlying message is little different from that reported in June. The headline Price balance edged up from +3% to +4% in July, following two months when the results were very slightly negative. Meanwhile, the Newly Agreed Sales net balance remained close to zero for the fourth month in succession. These results are consistent with a broadly stable housing market when viewed through the prism of a national perspective. As we have highlighted previously, the feedback to the RICS survey continues to suggest a stronger market in Scotland, Northern Ireland, much of the north of England, the Midlands and Wales. The London Price balance was little changed over the

month at -40% but this does represent a shift from the reading of -66% in April. The results for both the South East and East Anglia are consistent with very modest price declines, while the data for the South West points to a broadly flat picture.

It is perhaps no surprise that as speculation built ahead of the August Bank of England meeting (which was to see a quarter point rise in base rates) the headline New Buyer Enquiries series was little changed over the month with a net balance of +2%. The New Instructions measure similarly signalled a flat picture, following two months in a row of very modest increases. We acknowledged, last month, harbouring some doubts as to whether the pipeline of new supply into the sales market would continue to improve in the light of the feedback received on appraisals being conducted by valuers. For the record, the appraisal balance in July was once again firmly negative. As a result, our judgement is that the average inventory on the books of estate agents is likely to remain close to historic lows. This impact of this is visible in both the twelve month sales and price expectations net balances. While the former recorded a reading of -7%, its most negative number since October last year, the latter was much firmer at +25%.

Each quarter, an additional question is inserted into the survey in an attempt to capture the trend in the gap between ask and sales price. The latest set of results tell a broadly similar story to that seen in April and generally reflect the regional skew in the performance of the housing market. So, for properties put on the market at a price in excess of £1m, roughly one in ten are sold at a discount of more than 10%. In addition, around three-quarters of survey participants cite there being some negative gap between the initial ask and eventual sale price. For properties put on the market between £500k and £1m, the comparable numbers show only 2% of respondents seeing prices achieved coming in more than 10% below asking, although a still sizeable 62% of contributors report sales prices coming in below the initial asking price to some degree. Meanwhile, for the mainstream market (homes priced at under £500k), the largest share of respondents note ask and sales prices being at the same level. Significantly, the feedback in this area of the market actually shows one in five properties with a completion price above the ask price.

*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:

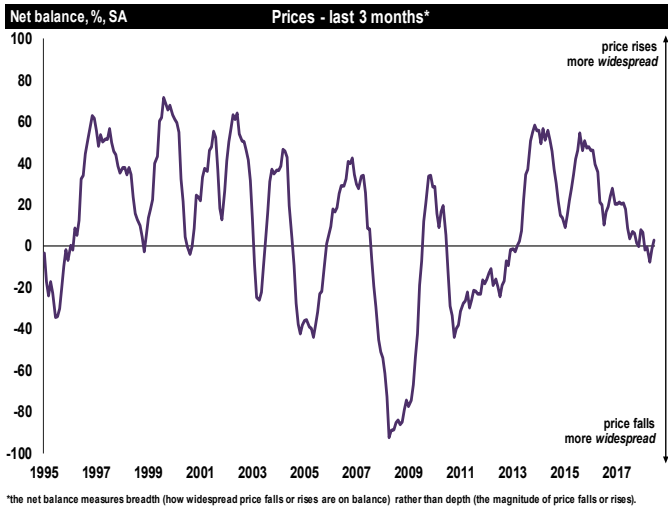
- August Survey: 13 September**
- September Survey: 11 October**
- October Survey: 8 November**

Number of responses to this month's survey:

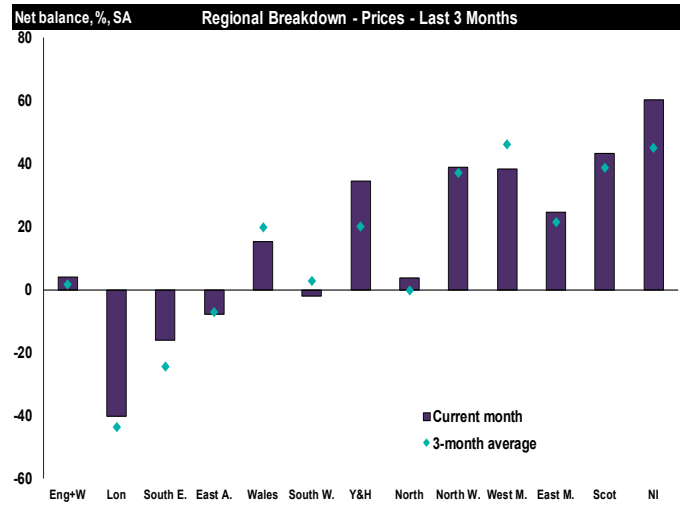
- This survey sample covers 620 branches coming from 304 responses

Sales market charts

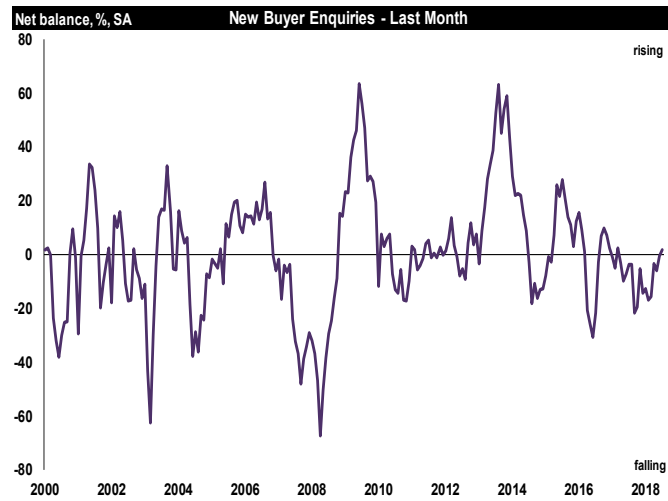
National Prices - Past three months



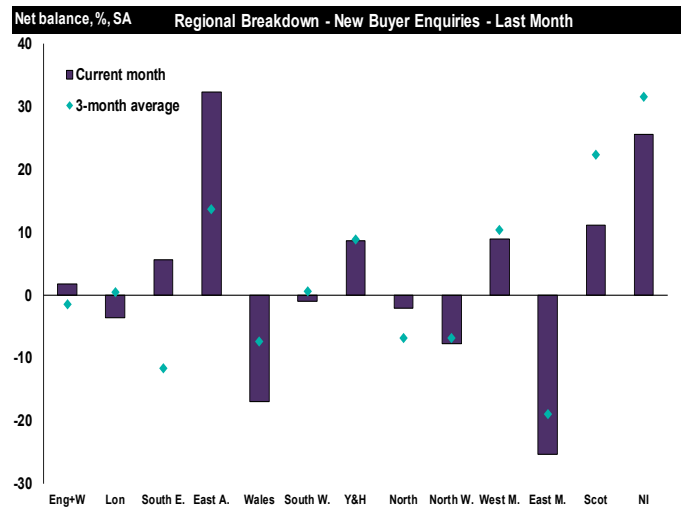
Regional Prices - Past three months



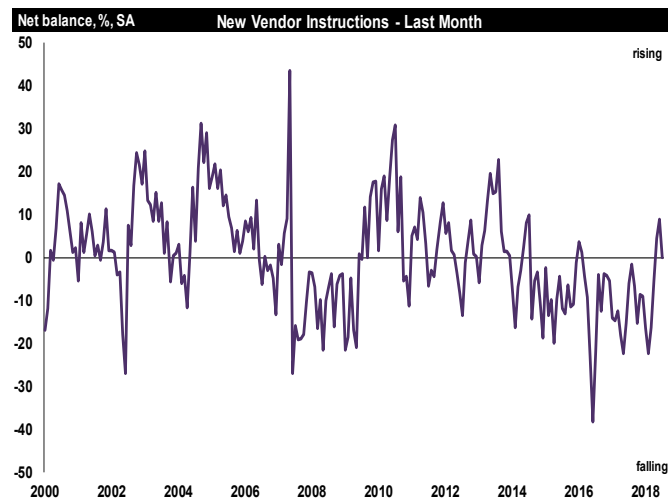
National Enquiries - Past month



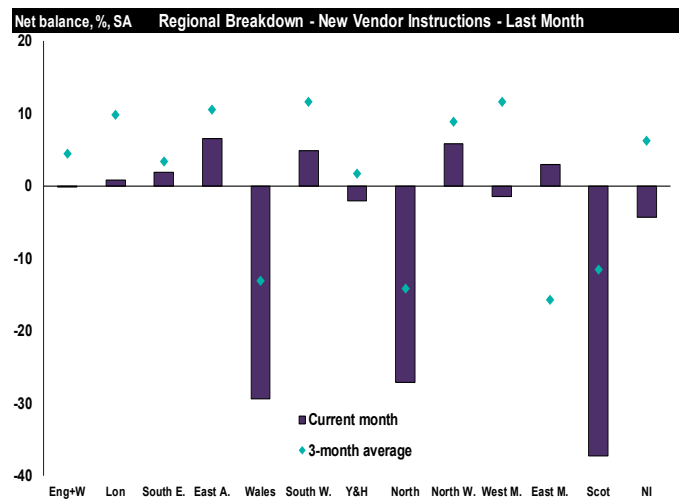
Regional Enquiries - Past month



National New Vendor Instructions - Past month

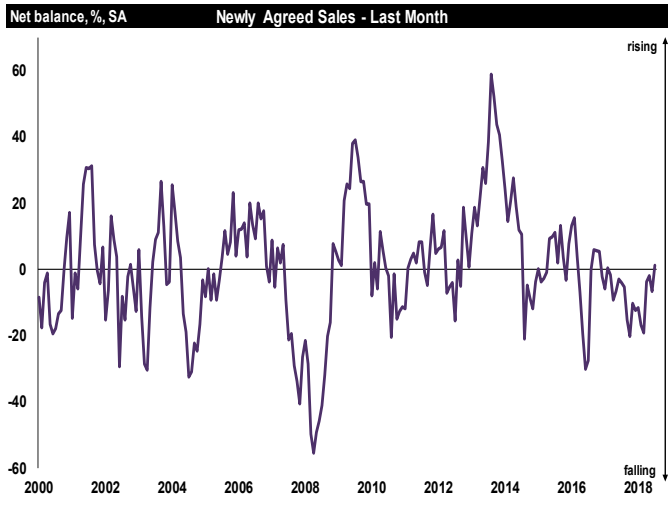


Regional New Vendor Instructions - Past month

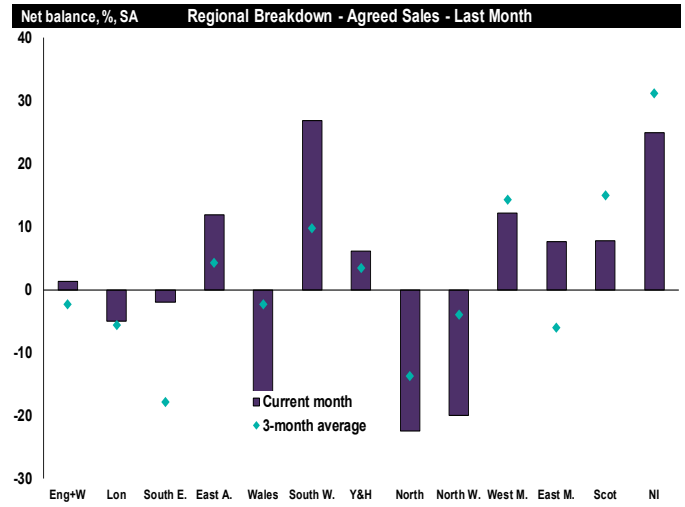


Sales market charts

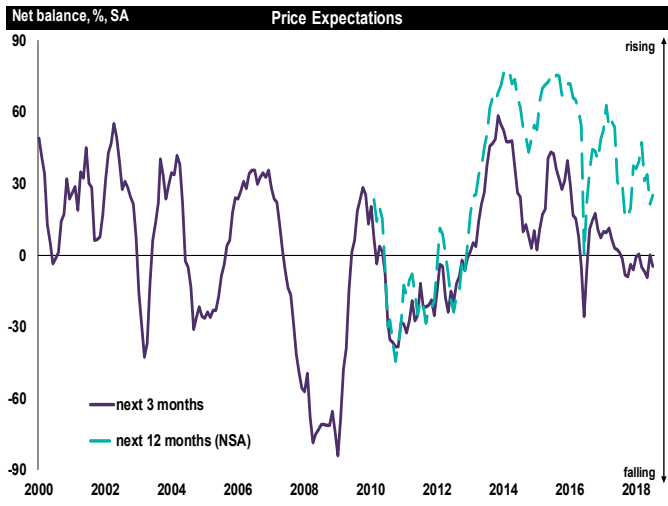
National Newly Agreed Sales - Past month



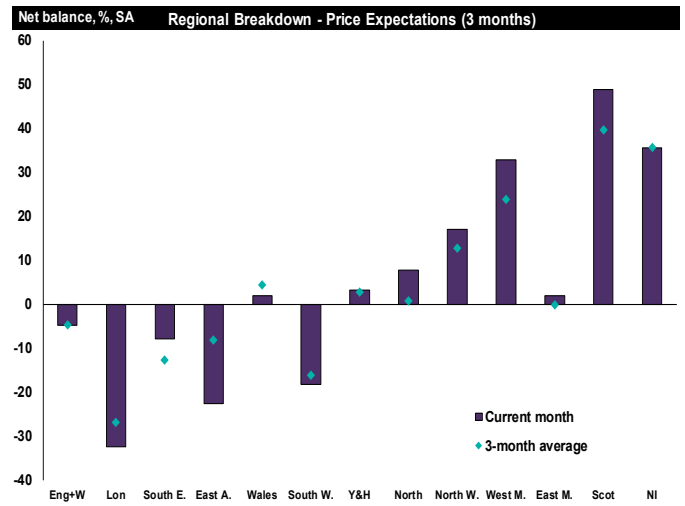
Regional Newly Agreed Sales - Past month



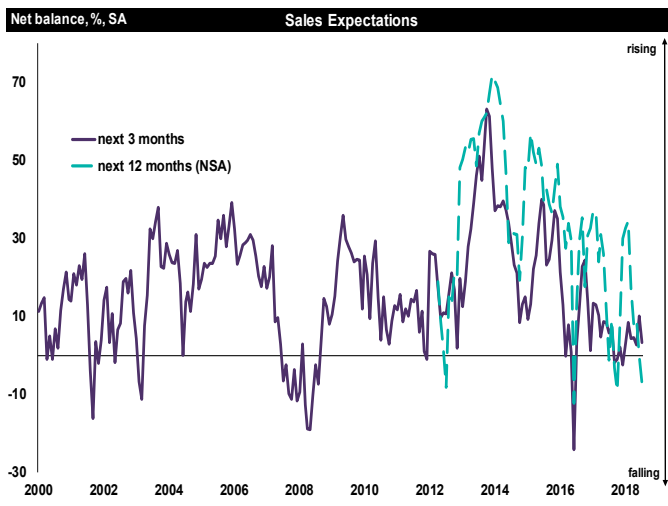
National Price Expectations - Three and twelve month expectations



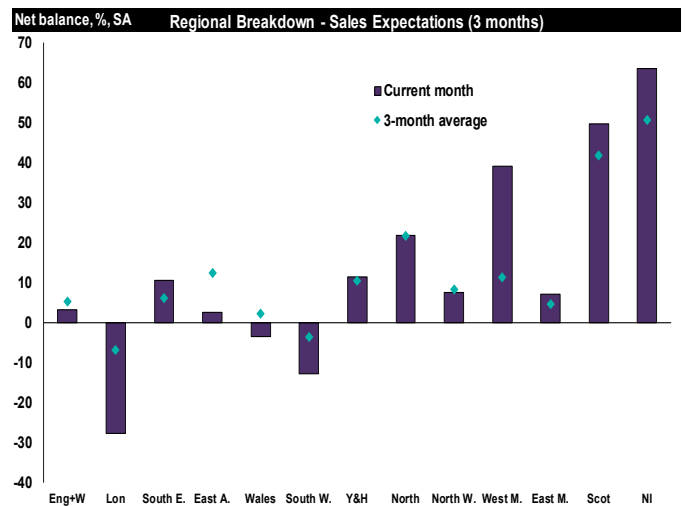
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

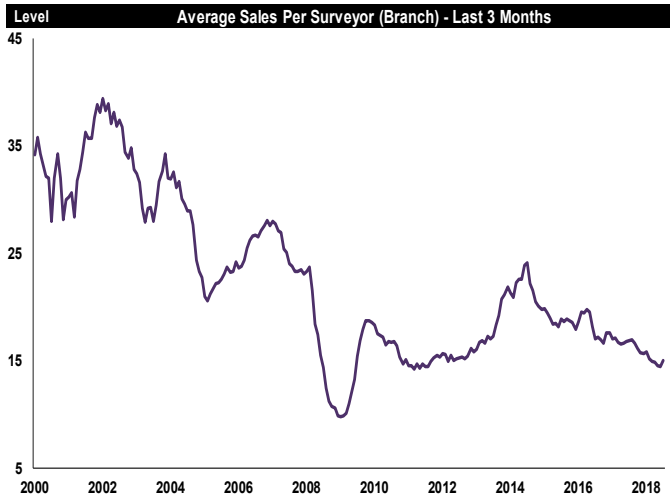


Regional Sales Expectations - Next three months

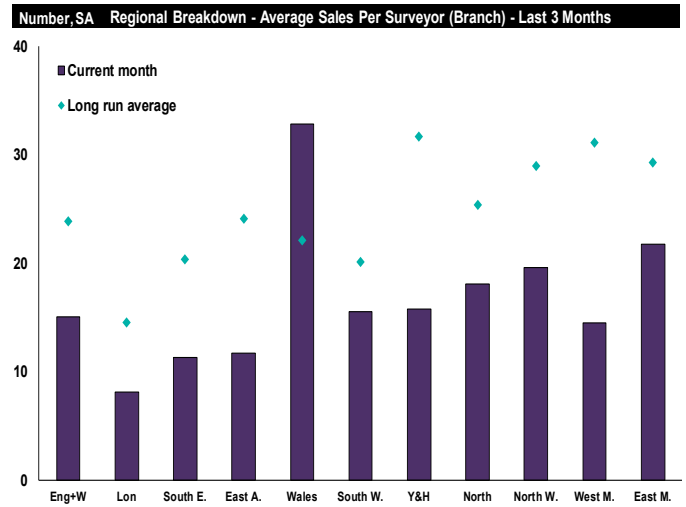


Sales market charts

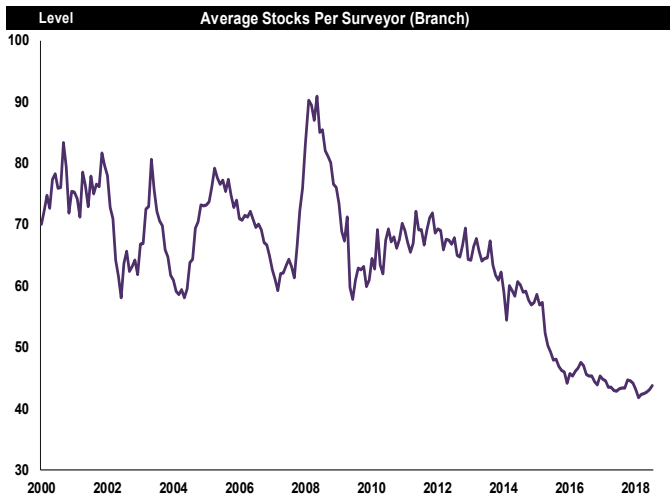
National Average Sales Per Surveyor - Past three months



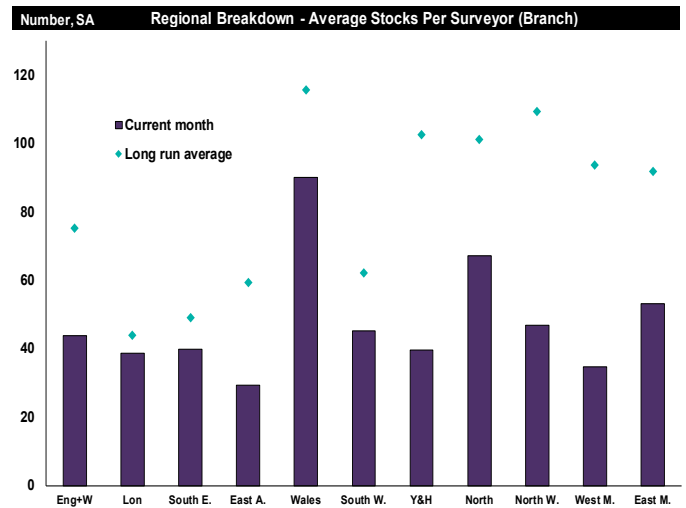
Regional Average Sales Per Surveyor - Past three months



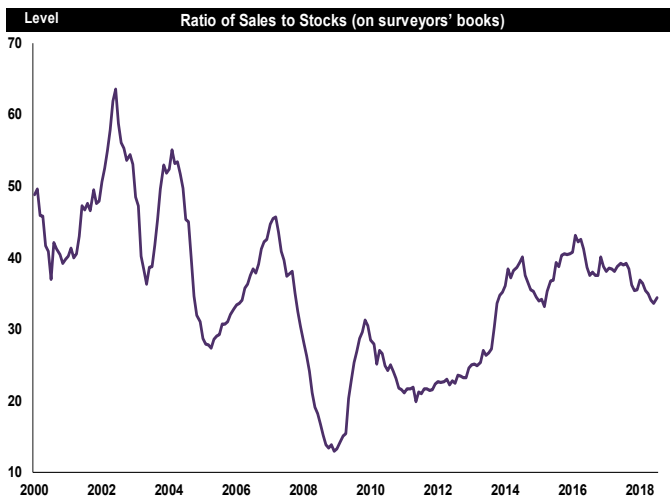
National Average Stocks Per Surveyor



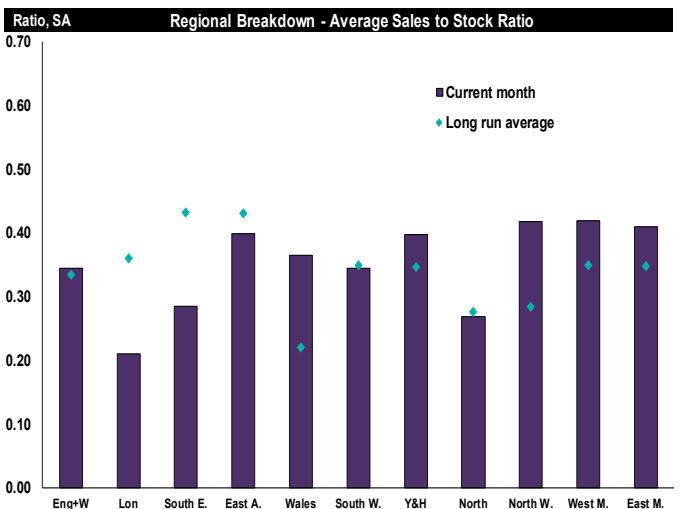
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

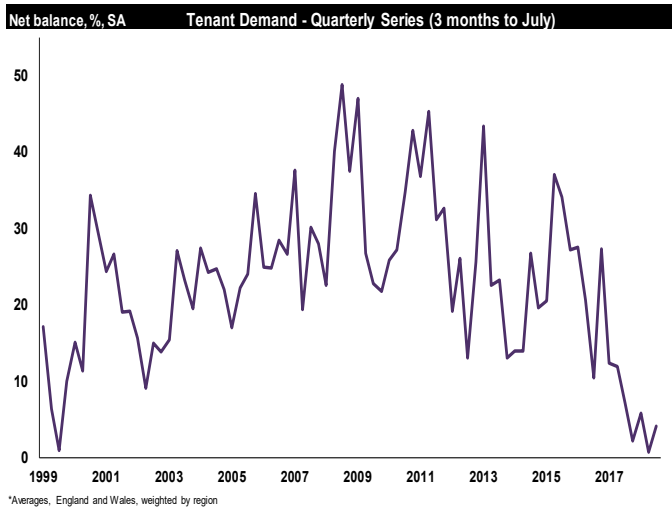


Regional Sales to Stock Ratio

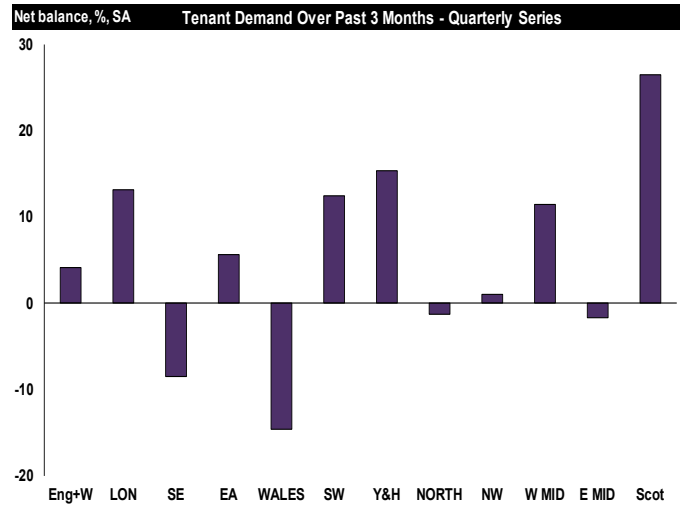


Lettings market charts

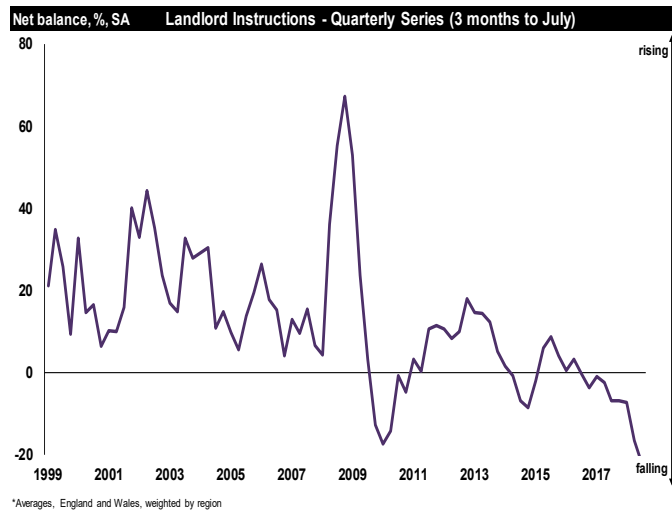
National Tenant Demand - Past three months



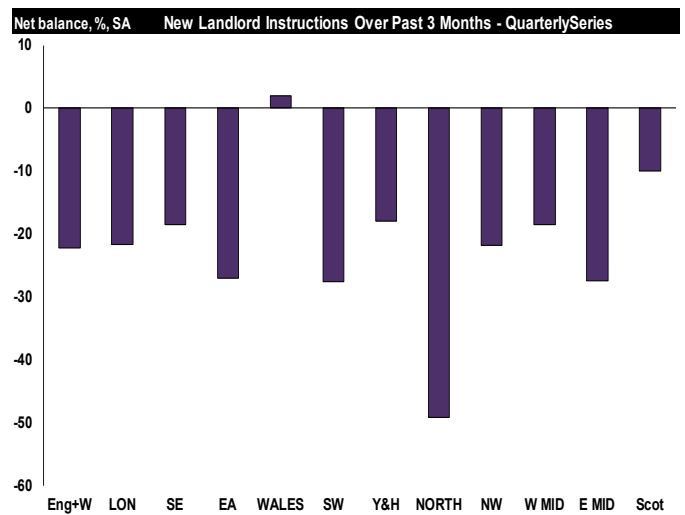
Regional Tenant Demand - Past three months



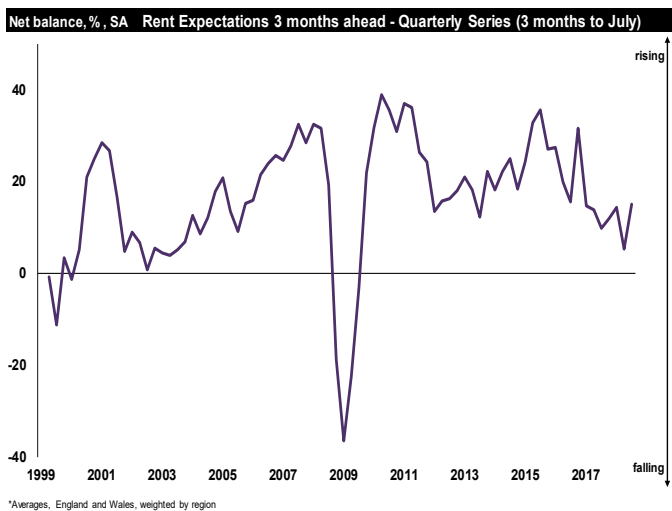
National New Landlord Instructions - Past three months



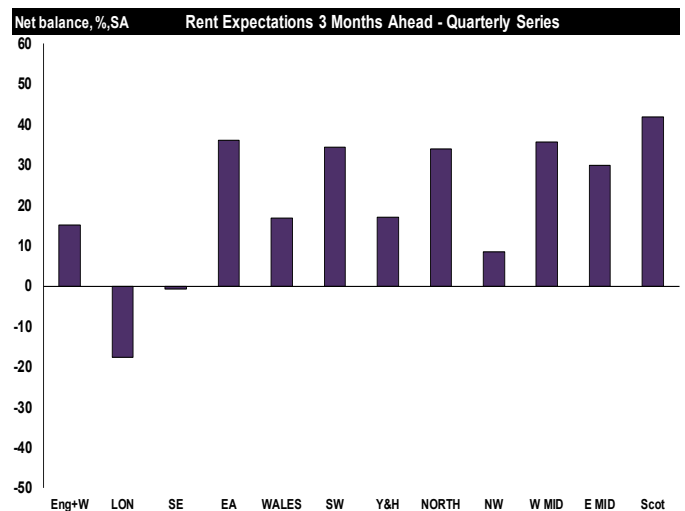
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

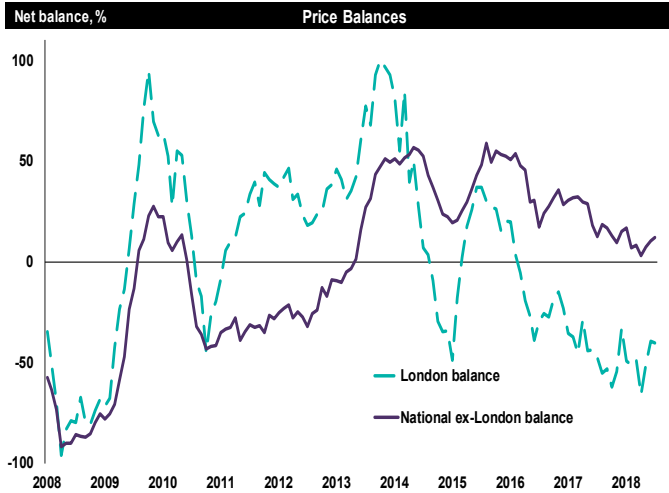


Regional Rent Expectations - Next three months

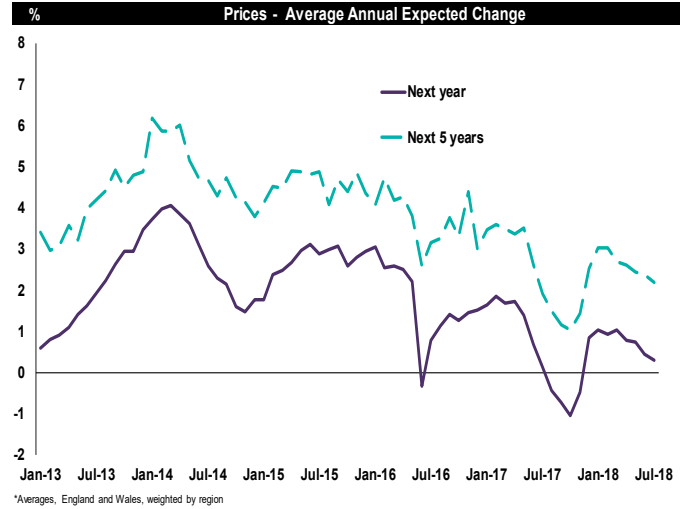


Expectations & other data

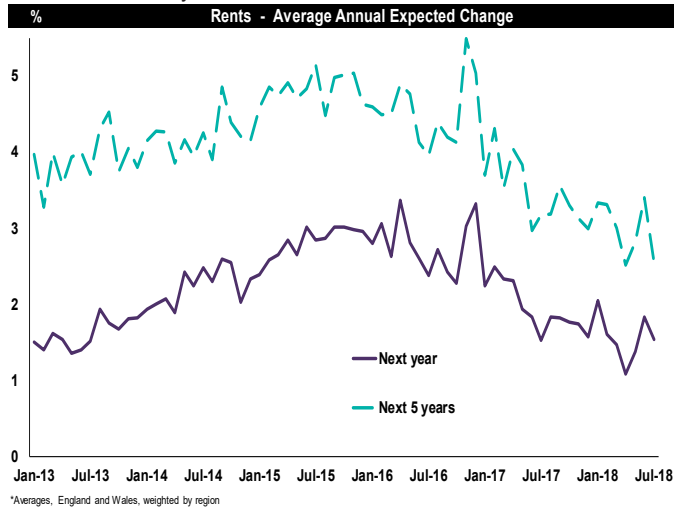
National Price Balance (excluding London) and London Price Balance - Past three months



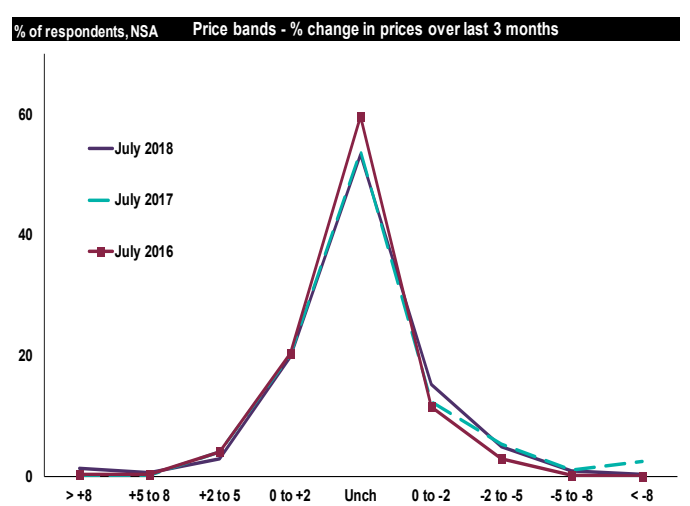
National Average Annual Expected Price Change (point estimate) - Next one and five years



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 - Despite the hot weather, there has been a steady stream of new instructions and sales. Prices are fairly static and well-presented properties will always be in demand.

Edward Seymour, Berwick upon Tweed, Edwin Thompson, 01289 304 432, e.seymour@edwin-thompson.co.uk - A very different market from this time last year. The brakes seem to be on in most sectors with caution being shown by purchasers and vendors alike.

Keith Pattinson FRICS, Newcastle, Keith Pattinson, 07770602155, keith.pattinson@pattinson.co.uk - Increase in stamp duty has made people realise that their current house has not increased in value. Indeed, many houses are for sale at less than owners paid for them, but there is a large payment to be made for stamp duty.

Mr T H Brannen Frics FRICS, Coastal / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Buoyant summer market with instructions up almost 50% on same time last year.

Neil Foster FRICS, Northumberland, Foster Maddison Property Consultants, 01434 605441 - Activity in July help up well with a consistent rate of sales agreed. There is no inflationary pressure on prices but the number of properties for sale increased slightly.

Paul Mcskimmings BSc (Hons) MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com - A very busy month compared with the previous month. Instructions and activity in the market appears to be slowing down with the onset of the school holidays.

Simon Bainbridge MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com - Erratic activity as we run into the holiday period.

Yorkshire & Humberside

Alex Mcneil MRICS, Huddersfield, Bramley, 01484 530361, alex.mcneil@bramleys1.co.uk - Currently calm and stable market with overall satisfactory demand in most sectors. Increase in available stock would enhance the choice of prospective purchasers. Confidence in market remains strong with little fear of chaos arising from Brexit.

Chris Clubley FRICS FAAV, Market Weighon, York, Clubleys, 01430 874000, www.clubleys.com, mw@clubleys.com - Stock levels remain low due to the continuing high level of sales. Prices have settled down now and more reductions are being seen, this is due to some agents overvaluing to win instructions.

David J Martindale MRICS, Wakefield, FSL, david.martindale@fslea.com - Continues to be fairly busy even during the holidays.

I Adams MRICS, East Riding of Yorkshire, Metropolis Surveyors, ianadams31@yahoo.co.uk - General shortage of houses coming into the market causing some price increases.

James Brown MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - Sales market remains flat.

John E Haigh MRICS FAAV, Knaresborough, Lister Haigh (Knaresborough) Ltd, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk - Summer holidays, sunshine, Brexit and now the interest rate rise are all impacting on the market.

Ken Bird MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - Steady market but sales taking longer to get to completion.

Mark J Hunter MRICS, Doncaster, Grice and Hunter, 01302 360141, www.gricehunter.co.uk, griceandhunter@btconnect.com - There continues to be a shortage of instructions and we are now starting to sell off the less desirable stock (which also tends to occur when you are reaching the end of a property boom). The Brexit situation is obviously restraining potential sellers.

Pete Shield FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - A modest slowdown has been noted and we expect this to continue through the school holiday period.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - We are now at the start of a holiday period which always has a slowing down effect on the market i.e. through July - August.

Philip Hayton APC, Leeds, Leeds Fed, 01133861137, www.leedsfed.com, philip.hayton@lfha.co.uk - A lot of demand has flushed through the market and the market still has price sensitivity. Large cities will continue to grow, small town less so. Many small landlords will exit the market because of tax changes. Uncertainty caused by Brexit worsening

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 501211 - Lack of stock and lack of investor clients. Market heading for the doldrums.

William Marshall, Leeds, Adair Paxton, 0113 205 4190 - People going off internet only agencies but it has lowered previous fees of high street agents.

North West

Derek Coates MRICS, Liverpool, Venmore, 0151 236 0301, www.venmore.co.uk, d.coates@venmores.co.uk - Signs of a slowdown in activity as a result of holiday period. Houses in popular locations still attracting lots of interest with multiple offers being received. Still a lack of properties coming to the market.

Ian Macklin FRICS, Hale Hale Barns Timperley, Ian Macklin & Company, 0161 980 8011, www.ianmacklin.com, halebarns@ianmacklin.com - Seems to be a general lack of confidence - Brexit may well be a factor.

John Halman FRICS, South Manchester, Gascoigne Halman., 01625 460344, jane@gascoignehalman.co.uk - Low levels of activity and a reluctance to commit. Brexit uncertainty having an effect.

John Williams FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 01513439060, www.b-a-o.com, john@b-a-o.com - Another strong month for sales which have yet to be affected by the onset of the summer holidays.

Roger Hardwick MRICS, Lancashire and Cumbria, Right Surveyors Cumbria/Lancs Ltd, rogershardwick@hotmail.co.uk - Sales always affected at time of school holidays.

Simon Wall FRICS, Southport, Wall & Macnab Ltd, 01704 872035, www.simonwall.com, simon@simonwall.com - The market remains buoyant with buyers outstripping supply at most price points.

Surveyor comments - sales

East Midlands

Andrew W York FRICS, Leicester, Moore & York Ltd, 0116 2558666, mooreandyork.co.uk, andrew.york@mooreandyork.co.uk - Market picked up in the last two weeks post world cup soccer and the heatwave.

Chris Charlton FRICS, Nottingham, Savills, 0115 9348020, www.savills.com, ccharlton@savills.com - The market continues to respond to sensibly placed pricing. The outlook remains uncertain however and stock has still not recovered sufficiently.

Christopher Shallice FRICS FAAV, Lincolnshire, Hix & Son, 01406 422 777 - Steady. Sales taking a long time to complete in many instances.

David Hawke FRICS, Nottinghamshire, David Hawke & Co., 01909 531450 - A better month for sales and instructions than expected, although underlying activity is generally quiet.

Mark Newton FRICS, Grantham, Newton Fallowell, 01476 591900, www.newtonfallowell.co.uk, mark.newton@newtonfallowell.co.uk - July activity was patchy. Instructions and sales up on 2017, but exchanges proving difficult to get out of the pipeline.

Paul Perriam BSc (Hons) MRICS, Nottingham, William H Brown/Bagshaws Residential, 01332 542299, www.sequencehome.co.uk, paul.perriam@sequencehome.co.uk - Intense competition for instructions. Properties coming to market attracting good levels of interest.

Peter Buckingham, Market Harborough, Andrew Granger & Co, 01858 431315, www.andrewgranger.co.uk, peter.buckingham@andrewgranger.co.uk - Sales have been surprisingly good bearing in mind the economic and political difficulties. Still a shortage of good quality property on the market, hence sales can be brisk.

Steve Gadsby BSc FRICS, Derby, Gadsby Nichols, 01332 296396, www.gadsbynichols.co.uk, stevegadsby@gadsbynichols.co.uk - Quieter month in terms of activity. Difficult to ascertain at this early stage whether this is seasonal, hot weather or Brexit.

West Midlands

Alexander Smith FRICS, Birmingham, Alex Smith & Company, 0121 784 6660, alex-smith.co.uk, alex@alex-smith.co.uk - Industrial and motor trade holidays July/August restricting instructions.

Colin Townsend MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A steady but unexciting market. Prices holding firm.

J J Dell MRICS FAAV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Instructions are low, people are not moving unless they have a good reason.

Jeremy Jehan MRICS, Hereford, Brightwells, 01432 261325, brightwells.com, jeremy.jehan@brightwells.com - The lack of stock over the last few years has finally led to a slowing in the market. Rather than fuelling price increases, this sluggishness is now seeing prices reduced to a more realistic level. Only stability will now see the market improve.

John Andrews FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Low to medium priced properties selling well. More large town and country properties now available which are selling slowly. Still constant and steady demand particularly in lower price ranges.

John Andrews FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - More activity over the last month, prior to start of holidays. Low to medium priced property is selling well with more expensive larger town and country properties selling slowly.

John Andrews FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Less property coming for sale, probably due to start of holiday season. Market generally stable, some increases to asking prices.

John Andrews FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - A quieter month due to start of main holiday season. There are requests for pre-appraisals which should develop into instructions early autumn.

M Cooper FRICS, Coventry, Coopers, mc@coopers-cov.com - Still very good demand for fairly priced properties and quick sales are being agreed. Over optimistic asking prices slow things down and do not work.

Mark Wiggin MRICS, Ludlow, Strutt and Parker, mark.wiggin@struttandparker.com - Prices are definitely wanting to nudge downwards. Vendors expectations are not in line with current sentiment. The market is undoubtedly softening.

Mike Arthan FRICS, Shropshire, Barbers, m.arthan@barbers-online.co.uk - Wider economic uncertainty causing potential sellers not to move.

R. R. Williams FRICS, Hay-On-Wye, Herefords., McCartneys, ryan@mccartneys.co.uk - Surprisingly busy given all the Brexit uncertainty. Top end suffering because of stamp duty changes and fewer proceedable buyers.

Richard Franklin BSc (Hons) MRICS, Worcestershire, Franklin Gallimore, 01584 810436 - Brexit indecision is really starting to bite with vendors staying put and awaiting the outcome. The lack of supply is causing a spike in values.

Rosemary Cheadle AssocRICS, RICS Registered Valuer, Wolverhampton, Worthington Estates, enquiries@worthingtonestates.co.uk - Market appraisals and instructions have been up for the last month but expecting a slight drop off over the summer holidays to come.

Stephen Smith MRICS, Walsall, Fraser Wood, 01922 629000 - Multiple offers are being received on properties in need of refurbishment by a number of investors, developers and buy to let applicants. The majority of new instructions are obtaining multiple viewings which come to offers.

East Anglia

Chris Philpot FRICS, Stowmarket, Lacy Scott and Knight, cphilpot@lsk.co.uk - No drought of instructions coming to the market.

David H Knights MRICS, Ipswich, David Brown & Co, 01473 222266, www.davidbrown-ipswich.co.uk, mail@davidbrown-ipswich.co.uk - Although a few properties have created reasonable interest, others that are overpriced create little or no interest. New instructions still difficult to come by. The weather and school holidays have started to have an impact on the market.

Ed Russell, Bury St Edmunds, Jackson-Stops & Staff, 01638 662231 - Market wilting in the heatwave too.

Jeffrey Hazel FRICS, Norfolk, Geoffrey Collins & Co., 01553 774135 - We have reached the summer holiday period. Still many market appraisals but fewer sales instructions - perhaps a busy autumn is in prospect.

Mark Wood MRICS, Cambridge, Carter Jonas, 01223 403330, carterjonas.co.uk, mark.wood@carterjonas.co.uk - Very busy beginning of July with good quality instructions, last week of July noticeably quieter mirroring the school holiday season.

Nicholas Rudge FRICS FAAV, Suffolk, Durrants, 01502 712122 - Brexit.

Surveyor comments - sales

Nigel Steele FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - A difficult and very slow market. Viewings are still taking place but buyer commitment is very weak. There are still far too many agents overvaluing and cutting fees which is suicidal.

Tim Yeomans MRICS, Nottingham/Derby, SDL Surveying, 07795266361, tim.yeomans@sdlssurveying.co.uk - Variable across the areas covered.

South East

Anthony Webb FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Brexit concerns alongside excessive stamp duty costs have deterred market activity and will continue to do so until the government accept the problems of their stamp duty miscalculation.

David Boyden BSc MRICS, Colchester, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk - Record temperatures, football, economic news in general coming into the school holidays hasn't motivated vendors to release property to the market nor buyers to chase it either.

David Nesbit FRICS, Portsmouth, D.M.Nesbit & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - Hot weather and holidays don't make for happy house hunting. The underlying hesitancy remains. Those who can, move quickly and prices are at attractive levels when available.

David Parish FRICS, Upminster, Gates Parish & Co., 01708 250033 - There is still a degree of caution in the market, particularly with higher priced properties. The number of properties available for sale is increasing, indicative of a slow market.

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

John Frost MRICS, Ashford, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Activity across the board has been markedly lower than this time last year, World Cup, hot weather and Brexit jitters.

John Frost MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Summer months upon us, therefore less activity later in July. Confidence still an issue, however, if the perception is that a property represents "good value" then strong activity being shown.

John Frost MRICS, Burnham, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Some considerable reductions but still not dramatically increasing activity.

Mark A K Lewis FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - Good motivated buyers are keen but sales are being slowed down by an increasing number of inefficient, ill-educated and incompetent solicitors.

Mark Everett FRICS, Epsom, Michael Everett & Company, markeverett@michael-everett.co.uk - A combination of sport, weather and Brexit have caused the summer 'recess' to arrive a month early. Despite some good quality stock, offices are frustratingly quiet. While the sun shines it will probably stay that way.

Martin Allen MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - The hot weather and now summer holidays have made a slow market slower.

Martin Lee MRICS, Southend On Sea, Countrywide Surveyors, martin.lee@cwsurveyors.co.uk - Brexit, school holidays.

Michael Brooker FRICS, Crowborough East Sussex, Michael Brooker, 01892-663377, sales@michaelbrooker.co.uk - Steady. If the price is right buyers are found within 2/3 weeks of marketing.

Philip Hiatt MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, www.your-move.co.uk/eastgrinstead, eastgrinstead@your-move.co.uk - Correct pricing essential to sell and buyers are being very selective. Hot weather and World Cup also created a temporary lull.

Stephen Wolfenden FRICS, Oxford, The County Homesearch Company, www.county-homesearch.com, oxfordshire@county-homesearch.com - Exceptional hot weather reduced activity. Now approaching August, quietest month of the year for new enquiries.

Tim Green MRICS, South Oxfordshire, Green & Co., 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - Property remains a solid investment but transactions are likely to remain low for the foreseeable future. Prices have no need for re-adjustment as long as sound advice was both given and taken before entering the market.

Tony Jamieson MRICS, Guildford, Clarke Gammon Welers, 01483 880900, www.clarkegammon.co.uk, tony.jamieson@clarkegammon.co.uk - There is an oversupply of brand new 2 bed apartments in Guildford town centre which has led to the prices having to come down to reflect the oversupply.

South West

Christopher Bailey MRICS, Exeter, Knight Frank, 01392848822, christopher.bailey@knightfrank.com - July has proved to be another busy month across all market sectors. Realistic pricing is producing close to guide price sales and competitive bidding.

David Lewis Bsc Hons, West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk - Prices have fallen - however, there is a good market with more realistic pricing. Buyers are nervous about the continued political uncertainty.

David Mckillop FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk - A quiet month as though everyone is holding their breath. Exchanges have all come through with some agreed back in March. Prices definitely dropping back. Some agents are still overpricing to gain instructions.

David Trim MRICS, Gillingham, Dorset, Chaffers Estate Agents Limited, 01747 822233, www.chaffersestateagents.co.uk, dave@chaffersestateagents.co.uk - Sales have been extremely strong, but fewer properties coming onto the market.

G C Thorne FRICS, East Dorset, Thornes chartered surveyors, 01202-684004, www.thornes.org.uk, graham@thornes.org.uk - The market remains very tight with not enough coming on or going off the market.

Ian Perry FRICS, Cheltenham Cirencester Nailsworth Stroud Tetbury, Perry bishop and chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - July was a record month for listings for our company and sales are above our budgeted expectations.

Surveyor comments - sales

James Cullen FRICS; Registered Residential Valuer, Swindon and Environs, Colleys Surveyors, jimcullen@halifax.co.uk - Uncertainty caused by the ongoing Brexit negotiations could cause a serious downturn in the housing market, if confidence is hit by a poor deal. This could be exacerbated if interest rates continue to rise.

James Mckillop MRICS, South West, Knight Frank, james.mckillop@knightfrank.com - June and July saw some excellent levels of activity but vendors cannot be complacent. My sense is that there is one buyer per £2m plus property at the moment. Competition needs competitive pricing.

James Wilson MRICS, Shaftesbury, Jackson-Stops, 01747 850858, jackson-stops.co.uk, james.wilson@jackson-stops.co.uk - Sales agreed have risen significantly although buyer confidence remains weak.

Jeff Cole MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - We had a good month in terms of sales agreed however things have definitely tailed off towards the end of the month coinciding with the start of the peak summer holidays.

Jeremy Priestley FRICS, Poole, Berkeleys, 01202708383, www.berkeleys.com, jeremy.priestley@yogroup.co.uk - A degree of inertia characterises the middle and upper markets: vendors unwilling to be realistic in pricing policy; most applicants unable to perform. Brexit, interest rate concerns, dominate sentiment.

John Corben FRICS, Swanage, Corbens, john@corbens.co.uk - The market remains fragile despite an increase in enquiries. The quarter rate interest rate rise will tend to slow the market.

Lloyd Smale FRICS, RICS Registered Valuer, Exeter, Drew Pearce 1748 Ltd, 01392 201748, drewpearce.co.uk, lms@drewpearce.co.uk - The advent of the school holidays often leads to drop off in enquiries but a good new instruction can buck the trend.

Matthew Harvey MRICS, Cotswolds, Tayler & Fletcher, 01451820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - Finally we have seen a lot of transactions exchanging contracts with fall through rates improving significantly and greater commitment in the market place.

O F Miles FRICS, Swanage, Oliver Miles, 01929 426655, www.olivermiles.co.uk, olivermiles@olivermiles.co.uk - The market remains fragile with fewer bona fide buyers looking. Increased level of sales being negotiated, but sales falling through more often due to uncertainty of Brexit, the general economy, and to some extent exacting solicitors.

Robert Cooney FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230230, robertcooney.co.uk, robert.cooney@robertcooney.co.uk - Sales still holding up but as anticipated school/family holidays dictate usual seasonal tail off in MA's.

Roger Punch FRICS, South Devon, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - The quality of life and attractions of our outstandingly beautiful area have produced strong sales for July, accentuating the need for fresh instructions which remain limited while the economy continues to hesitate.

Simon Barker MRICS, Sherborne, Knight Frank LLP, simon.barker@knightfrank.com - Brexit uncertainty is a real problem as is bad media commentary - all reducing buyer confidence. Buyers are becoming very cautious and if in doubt they do nothing. I think the current political upheaval is a disaster waiting to happen.

Simon Cooper FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - July was a much better month than last year for new sales though interestingly the market does feel weaker. However, there are buyers ready and able to purchase so when the right property at a fair price comes on, they get snapped up.

Wales

Andrew Morgan FRICS FAAV, Lampeter, Morgan & Davies, 01570423623, morganandd Davies.co.uk, lampeter@morganandd Davies.co.uk - A generally positive period. Quality property and best located achieving premiums. Better than 6 months ago.

Anthony Filice FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Brexit nervousness and concerns over the economy having an impact, unlike 12 months ago. Prices in lower price bands stabilising, prices below asking being achieved. Slowing in viewing activity, accelerated by hot weather and holidays.

David James FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - The second half of the month has been quieter, probably because of the summer holidays, although sales have held up.

David Owen Evans FRICS, Rhayader, Clare Evans & Co, 01597 810457, www.clareevansandco.co.uk, clare.evans@clareevansandco.co.uk - Two thirds of recent instructions have sold in excess of the asking price with strong buyer demand.

Paul Lucas FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Property market activity has remained constant for some 9 months - and well above activity for the previous 12 months.

London

Adam Sherley-Dale AssocRICS, London, Grainger plc, 020 7940 9575, www.graingerplc.co.uk, asherley-dale@graingerplc.co.uk - A number of abnormal factors have adversely affected the market recently, not least the World Cup and unusual fine weather.

Allan Fuller MRICS, Putney, Allan Fuller Estate Agents, 02087888822, www.allanfuller.co.uk, allan@allanfuller.co.uk - My office is succeeding in creating sales if the asking price is realistic and attracting interest. It seems the policy of many agents is to overvalue to get instructions which is creating a false market.

B K Bhalla MRICS, HI, CEA, Heathrow - Hounslow, Acrewoods, 0208 5775733, www.acrewoods.com, enquiries@acrewoods.com - Buyers and sellers are struggling to make sense of the housing market and the external influences that affect prices. For many agents, August is the most profitable month, but this year many agents will struggle to stay afloat due to a fall in house sales.

Christopher Ames MRICS, Belgravia, Ames Belgravia, 02077301155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - Demand has increased for properties with outside space (gardens/terraces) but too hot for many to view.

J.J.King FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - A month of hot weather, sport and school holidays have contributed to a slower market. Fewer registrations overall but with price reductions, this has converted more offers into sales agreed.

J.J.King FRICS, Merton Lb, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Both instruction and applicant levels have dipped this month, for the second successive month, although more offers and sales have been agreed.

Surveyor comments - sales

James Gubbins MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - Sales market entering the traditionally quieter summer period. So even quieter than it has been.

James Perris MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Very price sensitive market, slight decline in demand, not unexpected during the summer months.

Jeff Doble FRICS, London, Dexters, jeffdoble@dexters.co.uk - We are significantly ahead of last year and the market remains quietly encouraging.

Jeremy Leaf FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - We experienced a modest rise in sales agreed, stocks and viewings, but still find generating buyer commitment difficult. Prices stay fairly firm, underpinned by smaller family house shortage. Conversely, the interest rate rise may bring more certainty.

Kevin Ryan FRICS, Mayfair, Carter Jonas LLP, kevin.ryan@carterjonas.co.uk - A noticeable summer slowdown following an encouraging spring market. Such lack of activity is unsurprising at this time of year, particularly with such hot weather, but an anxious wait to see if things pick up after the holidays.

Richard Taylor Bsc (Hons) MRICS, London, London's Surveyors and Valuers, richard@lcsv.co.uk - Market sentiment remains weak in Central and Outer London. This is fuelled by economic uncertainty over Brexit.

Robert King, Middlesex, Jackson-Stops & Staff, 020 8943 9777 - Summer vacations.

Simon Aldous MRICS, London, London, 02070163861, savills.co.uk, saldous@savills.com - In our central offices we have continued to see falls but at lesser rate than in 2017. Our outer prime offices have seen greater falls in 2018 than in 2017. Importantly, transaction levels at the high end have held up.

Terry Osborne FRICS, Sw1, Tuckerman Residential Ltd, 020 7222 5510, tosbome123@yahoo.com - Brexit.

Tom Dogger MRICS, London, BN Investment Ltd, tdogger@bninvestment.co.uk - The continued uncertainty of Brexit, combined with punishing transaction costs are deterring any movement in the sales market, unless it is essential. Sellers have to offer large discounts to attract any interest.

William Delaney AssocRICS, City of London, Lawrence Ward & Co., 02073379600, www.lawrenceward.co.uk, w.delaney@lawrenceward.co.uk - We have now entered the summer season. Political and economic uncertainty, summer holidays, very hot weather and today's (albeit small) hike in interest rates are all contributing to the current hiatus.

Scotland

Adrian Stott FRICS, Lothians, J and E Shepherd, 01316533456, shepherd.co.uk, a.stott@shepherd.co.uk - Continued lack of supply driving prices in excess of home report values.

Alex Inglis MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com - A general lack of new properties coming on to the market is good news for sellers. We currently have more buyers than sellers and have had some busy closing dates.

Chris Hall MRICS, Edinburgh, Rettie and Co, chris.hall@rettie.co.uk - Market still a sellers market in the preferred districts of Edinburgh and Glasgow, but slower in many rural districts which are beginning to look good value in comparison.

David Cruickshank MRICS, Elgin, D M Hall, 01343 548 501, david.cruickshank@dmhall.co.uk - Fewer properties going onto the market compared to the previous three months. Sales continuing at a similar level.

GP Duff MRICS, Argyll, DM Hall, gary.duff@dmhall.co.uk - Scottish school holidays start and delay instructions/sales.

Graeme Gilchrist MRICS, Tayside, Graham + Sibbald, 01382 200064, www.g-s.co.uk, graeme.gilchrist@g-s.co.uk - No changes into late summer as the market stock remains depleted and sale prices in excess of their Home Report level continue to be achieved.

Graeme Lusk BSc MRICS, Glasgow and Renfrewshire, Walker Fraser Steele, 01412480038, www.walkerfrasersteele.co.uk, graeme.lusk@walkerfrasersteele.co.uk - Another busy month even taking into account the school holidays. It is still a good time to sell as there is limited stock coming to the market.

Ian Morton MRICS, St andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - Still a lack of properties coming to the market for sale. Closing dates for offers are becoming more common due to lack of stock.

John Brown FRICS, Edinburgh, John Brown and Company, 07768 583 919, jb-uk.com, john.brown@jb-uk.com - Edinburgh and East of Scotland is experiencing a mini boom below 0.5m the market is very positive. Explained by lack of stock and continued interest in the city from other areas. Top end is very short of good quality homes, some sold privately.

Kevin Macdonald MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, kmacdonald@g-s.co.uk - As expected, July slowed for the start of the holiday period despite sales remaining steady with good levels of interest and strong prices paid. Unsettling doubts over future Brexit "Deal or No Deal" is having no clear effect on the market - as yet.

Marion Currie AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com - Summer activity continues at a good pace in Dumfries & Galloway with both new instructions and new buyers coming forward. Realistic pricing remains key to success.

Peter Drennan BSc MRICS, Edinburgh, Allied Surveyors Scotland, 0131 226 6518, peter.drennan@alliedsurveyors-scotland.com - Summer lull has prompted thought on what is going to happen in the next 6 to 18 months and beyond. Number of buyers and transactions is down. Still some very high prices paid. A split market beckons.

Thomas Baird MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, www.selectsurveyors.co.uk, reception@selectsurveyors.co.uk - The summer month of July has seen a drop in home reports on this time last year. Sale prices achieved still appear to be buoyant.

Tom Murray AssocRICS, RICS Registered Valuer, Girvan, South Ayrshire, Galloway & Ayrshire Properties, 01465 713498, www.gapinthemarket.com, tom.murray@gapinthemarket.com - With the good weather continuing, July was equally as busy as June. A good balance of new instructions kept the market active and provided great choice for a variety of well motivated applicants.

Surveyor comments - sales

Tony Perriam MRICS, Scottish Borders, Rettie Borders, 01896 824070, www.rettie.co.uk, tony@rettie.co.uk - After an exceptionally busy late Spring, the customary and expected lull at the start of the school holidays has been superseded by brisk activity on inspections, viewings and agreed sales.

Northern Ireland

Daniel Mc Leron FRICS, Omagh, Co. Tyrone, Mc Leron Estate Agents, 02882 242772, www.mclernonestateagents.com, info@mclernonestateagents.com - Starter home demand still buoyant. Some recovery noted at upper end of the market.

Eoin Lawless 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 sales agreed and completion.

Kirby O'Connor AssocRICS, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - The sales market has been strong and hasn't slowed over the July period. Strong demand but not enough supply.

Samuel Dickey MRICS
Spokesperson for NI, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - Rental demand continues to be strong even in holiday season.

Stephen Fitzpatrick MRICS, Newry and Mourne, Stephen Fitzpatrick & Co. Estd.1881, 02830265533, www.stephenfitzpatrick.co.uk, info@stephenfitzpatrick.co.uk - There is an overall lack of confidence with the uncertainty of Brexit and implications in Northern Ireland. An even weaker pound and the March 29th 2019 deadline on the horizon.

Surveyor comments - lettings

North

Keith Pattinson FRICS, Newcastle, Keith Pattinson, 07770602155, keith.pattinson@pattinson.co.uk - Stamp duty has depressed prices, and some owners who remortgaged are now in negative equity. Many owners who bought 20 years ago are selling, but some have no equity, so are locked in. If they took a short fixed term loan, lenders are not keen to continue.

Mr T H Brannen Frics FRICS, Coastal / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Strong demand from tenants but still a low supply available. Many Landlords are selling and leaving the PRS altogether.

Neil Foster FRICS, Northumberland, Foster Maddison Property Consultants, 01434 605441 - Virtually no new stock and even re-let instructions are waning, which is pushing rents higher and pressuring tenants.

Richard Towler MRICS, Penrith, Eden Lettings & Management, enquiries@edenletting.co.uk - Property is letting readily with supply and demand being unbalanced. An increasing number of small landlords are selling up and although property is also coming onto the market, it is not in sufficient numbers to compensate.

Yorkshire & Humberside

Alex Mcneil MRICS, Huddersfield, Bramley, 01484 530361, alex.mcneil@bramleys1.co.uk - Private rented market continues to grow with more long-term renters and landlords. More good quality housing stock required if market is to continue to grow.

Chris Clubley FRICS FAAV, Market Weighon, York, Clubleys, 01430 874000, www.clubleys.com, mw@clubleys.com - Tenant demand is strong, however, there is a shortage of properties. The lack of supply is increasing asking rents.

David J Martindale MRICS, Wakefield, FSL, david.martindale@fslea.com - Still a good deal of activity.

I Adams MRICS, East Riding of Yorkshire, Metropolis Surveyors, ianadams31@yahoo.co.uk - Fairly static, supply and demand in balance.

James Brown MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - Lettings market remains good with a lack of stock creating high demand.

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

Peter Green, Halifax, Brearley-Greens, 01422 330088 - The Lettings Market is not affected as much as sales. The July period has been reasonably good.

Philip Hayton APC, Leeds, Leeds Fed, 01133861137, www.leedsfed.com, philip.hayton@lfha.co.uk - Rents will increase because of high tax, leading to a lack of investors buying new stock and exiting the market. Investment will fall in value with 3% stamp duty and increased regulation.

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 501211 - Large supply of 1 bed apartments. Minimal demand as Europeans leave UK, lack of investors willing to buy the empty stock and 1 bed apartments have no appeal to homeowners, they prefer 2 beds.

North West

Ed Goodwin, Northwich, Wright Marshall, 01606 41318, wrightmarshall.co.uk, edgoodwin@wrightmarshall.co.uk - Landlords instructions still low and tenant demands increasing.

John Halman FRICS, South Manchester, Gascoigne Halman, 01625 460344, jane@gascoignehalman.co.uk - Strong tenant demand.

Roger Hardwick MRICS, Lancashire and Cumbria, Right Surveyors Cumbria/Lancs Ltd, rogershardwick@hotmail.co.uk - Static all year.

Simon Wall FRICS, Southport, Wall & Macnab Ltd, 01704 872035, www.simonwall.com, simon@simonwall.com - The lettings market remains active with good levels of interest across all price levels and property types.

East Midlands

Andrew W York FRICS, Leicester, Moore & York Ltd, 0116 2558666, mooreandyork.co.uk, andrew.york@mooreandyork.co.uk - Market in equilibrium.

Christopher Shallice FRICS FAAV, Lincolnshire, Hix & Son, 01406 422 777 - Reasonable demand but a substantial volume of poor quality applications.

David Hammond BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Busy market lack of suitable stock. Good tenant demand for quality properties.

John Chappell BSc (Hons) MRICS, Skegness, Chappell & Co Surveyors Ltd, 01754 769673, www.skegnesssurveyors.co.uk, john@chappellandcosurveyors.co.uk - Quite an uneven period of demand. Continuing hot weather appears to be suppressing movers. Universal credit problems have resulted in more landlords declining benefit dependant applications.

Nicholas Richardson FRICS, Beeston, Nottingham, Nicholas Richardsons, 01159677589, www.nicric.co.uk, nrichardson@nicric.co.uk - Landlords worried by adverse TV programs and Selective Licensing Costs. Some are selling up.

Peter Buckingham, Market Harborough, Andrew Granger & Co, 01858 431315, www.andrewgranger.co.uk, peter.buckingham@andrewgranger.co.uk - Supply matching demand at present.

West Midlands

Andrew Pearce MRICS, Wolverhampton, Millennium Properties, 01902 836036 - Labour market mobility and migration has seen demand to rent increase but legislative and tax changes have seen supply decrease, hence rents are rising.

Colin Townsend MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - Slightly slower levels of activity but still a solid market.

D J Satchwell FRICS, Coventry, Marston Management, d.j.satchwell@marstonmanagemnet.com - Quiet in the summer due to holidays. Student influx has affected the market.

Dean Taylor MRICS, Harborne/ Birmingham, JPTaylor, 0121 4284333, www.jptaylor.co.uk, dean@jptaylor.co.uk - We are seeing a slightly increased level of potential landlords, however tenant demand is still outstripping our available stock.

J J Dell MRICS FAAV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - At the time of writing, we have no properties to let which is an indication of the tight market.

John Andrews FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Demand still exceeds supply and all types of flats and houses letting well with rents slowly increasing.

Surveyor comments - lettings

John Andrews FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - Constant and steady demand for all types of rented properties. Flat accommodation well supplied, although more 2/3 bedroom houses is needed to satisfy demand.

John Andrews FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Still a strong demand for all types of rented accommodation throughout the area. Flat accommodation available to let in short supply.

John Andrews FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - The same strong rented accommodation market as seen throughout all this year. Rents rising gradually due to demand exceeding supply.

M Cooper FRICS, Coventry, Coopers, mc@coopers-cov.com - Student demand for old housing slowing as huge number of new purpose built blocks springing up adjacent to Coventry's 2 universities.

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

Nicholas Lamb MRICS, Birmingham, Naismiths, 0121 2623450, www.naismiths.com, nicholas.lamb@naismiths.com - Demand is still outstripping supply for good quality properly managed and maintained family housing.

R. R. Williams FRICS, Hay-On-Wye, Herefords., McCartneys, ryan@mccartneys.co.uk - Steady as we go. Plenty of demand but fewer investors buying because of extra stamp duty and fear of price falls next spring.

Richard Franklin BSc (Hons) MRICS, Worcestershire, Franklin Gallimore, 01584 810436 - Landlords reviewing retention when property becomes void, will cause reduction in supply and rents to increase.

Stephen Smith MRICS, Walsall, Fraser Wood, 01922 629000 - Supply issues, possibly due to the exit of some private buy-to-let investors from the market during the last 12 months, continue to exert an upwards pressure on the level of rents.

East Anglia

Chris Philpot FRICS, Stowmarket, Lacy Scott and Knight, cphilpot@lsc.co.uk - Still good demand.

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

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.

Tim Yeomans MRICS, Nottingham/Derby, SDL Surveying, 07795266361, tim.yeomans@sdlurveying.co.uk - Steady.

South East

David Boyden BSc MRICS, Colchester, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk - Our best letting stats for 9 months despite football/weather/gloomy economic news. Several landlords, hoping to sell their BTL quickly sensing a change in the air, have re-let to keep cash flowing and will not sell just at any price.

David Parish FRICS, Upminster, Gates Parish & Co., 01708 250033 - Demand remains high. Good quality properties that are well fitted are letting readily.

Howard Mecklenburgh MRICS, Watford, LPand M, howard@lpandm.co.uk - Current demand low due to holiday season.

James Farrance MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Stock levels declining as some landlords are reducing their holdings due to tax and cost burden from the government increasing. BTL investors are also thin on the ground put-off by the crippling levels of stamp duty.

John Frost MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Lack of confidence in the buy to let sector, shortening stock levels.

John Frost MRICS, Burnham, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Price sensitive, low stock.

Mark A K Lewis FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - Landlords required to satisfy strong tenant demand.

Martin Allen MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - Encouraging signs of increased activity in the lettings market, but is very sensitive to rental levels.

Michael Brooker FRICS, Crowborough East Sussex, Michael Brooker, 01892-663377, sales@michaelbrooker.co.uk - Steady. Plenty of tenants but lack of supply.

Mr Jeremy Q Fisher MARLA, Beaconsfield, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Beaconsfield has seen a busy market with very good levels of lets, however there have been fewer tenants registering.

Mr Jeremy Q Fisher MARLA, Burnham, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Burnham is experiencing a stable lettings market and had a strong April - July result. The quality of the tenants has become a slight concern.

Mr Jeremy Q Fisher MARLA, Langley, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Langley has seen tenant activity remain constant but the quality is poor. Landlord levels have remained unchanged but we are up year on year on the number of lets agreed.

Mr Jeremy Q Fisher MARLA, Gerrards Cross, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Gerrards Cross is seeing a busy market place at the moment with long awaited movement in the mid to upper prices ranges.

Mr Jeremy Q Fisher MARLA, Feltham, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Feltham is still seeing a busy market but could do with more new landlords as letting whatever comes on the market. Tenant quality very mixed.

Mr Jeremy Q Fisher MARLA, Windsor, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk - Windsor has seen a very busy April - July with increased volumes compared to the same period last year. Could do with more landlords.

S B B Askaroff BSc (Hons) MRICS, Eastbourne, Estatewise, 01323 412010 - Market has dropped off with holiday lull. Rents remain competitive. Increased number of social housing applicants.

Stephen Wolfenden FRICS, Oxford, The County Homeseach Company, www.county-homeseach.com, oxfordshire@county-homeseach.com - Experiencing more departures back to EU from tenants working for European companies.

Stuart Gray MRICS FAAV, St Albans, Strutt & Parker, 01727 738280, www.struttandparker.com, stuart.gray@struttandparker.com - Continuing brisk market for smaller properties but larger homes slower to let.

Surveyor comments - lettings

Tony Jamieson MRICS, Guildford, Clarke Gammon Womersley, 01483 880900, www.clarkegammon.co.uk, tony.jamieson@clarkegammon.co.uk - There has been an increase in properties available for rent and no increase in tenant demand, so rent values are falling and we expect this trend to continue.

South West

James Cullen FRICS; Registered Residential Valuer, Swindon and Environs, Colleys Surveyors, jimcullen@halifax.co.uk - Lettings market could become even more competitive, if the market collapses after Brexit and fewer properties are offered for sale, or fewer buyers enter the market due to economic instability.

Matthew Harvey MRICS, Cotswolds, Tayler & Fletcher, 01451820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - Continuing lack of supply in the Cotswolds coupled with good demand has seen prices remain firm.

Paul Oughton MARLA, MNAEA, Cirencester and The Cotswolds, Moore Allen & Innocent LLP, 01285648100, www.mooreallen.co.uk, paul.oughton@mooreallen.co.uk - A welcome pick up in activity in recent weeks, across both supply and demand.

Simon Cooper FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - Incredibly strong tenant demand and a definite lack of instructions to satisfy demand. I can see rents increasing as a result.

Wales

Anthony Filice FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Limited numbers of landlords bringing new properties to market, resulting in higher rents and more rapid lets.

David Owen Evans FRICS, Rhayader, Clare Evans & Co, 01597 810457, www.clareevansandco.co.uk, clare.evans@clareevansandco.co.uk - Tenant demand continues to outstrip supply for all classes of property.

Martine Harris MRICS, Cardiff, Mognie James, martine@mogniejames.co.uk - Rent Smart Wales has had a huge effect on our lettings market - the tenants fee ban is also going to have a huge negative impact.

Paul Lucas FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Rental enquiries are slightly down on six months ago, although lettings activity is strong.

London

Allan Fuller MRICS, Putney, Allan Fuller Estate Agents, 02087888822, www.allanfuller.co.uk, allan@allanfuller.co.uk - We are finding the letting market remaining generally stable, tenants are mainly staying longer and there is very little new rental property coming to our local market due to fewer investors (because the tax changes have adversely affected investors).

B K Bhalla MRICS, HI, CEA, Heathrow - Hounslow, Acrewoods, 0208 5775733, www.acrewoods.com, enquiries@acrewoods.com - There has been a drop in demand for second hand converted flats generally. Tenants are prepared to pay more for purpose built flats even if it does not come with parking. The number of new builds is starting to reduce pressure on stocks and rents.

J.J.King FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Regularly a busy period with activity levels peaking, due to tenants planning moves this time of year. More re-lets than new lettings.

J.J.King FRICS, Merton Lb, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - July is moving month in the lettings world, as tenants use the summer to relocate. More re-lets than lettings as stock levels remain static.

James Gubbins MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - Tenant demand improving, stock levels reducing but healthy.

Jeff Doble FRICS, London, Dexters, jeffdoble@dexters.co.uk - Very busy market indeed.

Jeremy Leaf FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - The lettings market continues to mirror sales for us. A small listings increase is giving prospective tenants too much choice so rents are softening. We recorded a marked increase in registrations for September so expect to be busier.

Jilly Bland John Collard MRICS, Wimbledon, Robert Holmes & Co, 0208 879 9669, www.robertholmes.co.uk, jilly@robertholmes.co.uk - Anyone failing to sell is now keen to rent for up to a year before testing the sales market again.

Mark Wilson MRICS, London, Globe Apartments, 020 7034 3435, www.globeapt.com, mark@globeapt.com - The market is more stable than of late and a few new instructions would be welcome.

Robert King, Middlesex, Jackson-Stops & Staff, 020 8943 9777 - Summer vacations.

Simon Aldous MRICS, London, London, 02070163861, savills.co.uk, saldous@savills.com - Rents continue to fall but at lesser rates than in 2017; albeit higher levels of supply continue. There is still a premium for those properties that are best in class.

Terry Osborne FRICS, Sw1, Tuckerman Residential Ltd, 020 7222 5510, tosbome123@yahoo.com - Brexit.

Tom Dogger MRICS, London, BN Investment Ltd, tdogger@bninvestment.co.uk - With the phasing in of the abolition of interest relief on private Landlords borrowings, coupled with the prospect of increasing red tape surrounding Tenants rights, we are seeing many Investors trying to sell their properties. Rents to increase?

Will Barnes Yallowley AssocRICS, Kensington London, LHH Residential, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - Continuing price sensitivity.

William Delaney AssocRICS, City of London, Lawrence Ward & Co., 02073379600, www.lawrenceward.co.uk, w.delaney@lawrenceward.co.uk - Rentals have been surprisingly busy. The level of enquiries is down compared to last year but provided the landlord's rental expectations are reasonable and the properties presented in excellent order, then voids are being kept to a minimum.

Scotland

Carolyn Davies MRICS, Dumfries, Savills, 01387 263066, www.savills.co.uk, cmadavies@savills.com - Very quiet due to lack of supply at the current time and middle of Scottish summer holidays. Pressure on rents where properties are not being kept in top quality condition.

Ian Morton MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - Still a good demand from tenants for family homes although fewer properties available for rent. Investors more cautious in expanding their portfolios in recent months.

Surveyor comments - lettings

John Brown FRICS, Edinburgh,
John Brown and Company,
07768 583 919, jb-uk.com, john.
brown@jb-uk.com - Rentals
market is changing. Landlords
are wary of new restrictions
pending but demand strong
for available stock. Big student
housing development is
changing supply. Tenants expect
good standard of property and
management.

John Gell MRICS, Inverness,
Simply Let, 01463 718888,
www.simplylet.biz, john.gell@
simplylet.biz - Increase both in
tenants seeking accommodation
and in new client instructions, the
latter mostly investors.

Neil Woodhead FRICS,
Inverclyde, Castle Estates,
01475784781, www.castle-
estates.co, neil@castle-estates.
co - Quality properties still letting
well.

Rachel Bromby MRICS, Nairn,
Cawdor Estate, rachel@cawdor.
com - New private residential
tenancies reducing number
of properties available and
increasing rents.

Northern Ireland

Kirby O'Connor AssocRICS,
Belfast, GOC Estate Agents,
02890662366, www.
gocestateagents.com, kirby@
gocestateagents.com - Rental
market very good this year,
strong demand levels on both
low and higher end.

Samuel Dickey MRICS
Spokesperson for NI, Belfast,
Simon Brien Residential,
02890595555, www.simonbrien.
com, sdickey@simonbrien.com -
Sales are still strong, particularly
in the new homes sector.

Stephen Fitzpatrick MRICS,
Newry and Mourne, Stephen
Fitzpatrick & Co. Estd.1881,
02830265533, www.stephen
fitzpatrick.co.uk, info@
stephenfitzpatrick.co.uk - There
is an overall lack of confidence
with the uncertainty of Brexit and
implications in Northern Ireland.
An even weaker pound and the
March 29th 2019 deadline on the
horizon.

Surveyor contact details

North

Andrew Holmes BSc (Hons) Dip Surv MRICS, Cumbria, Thomson Hayton Winkley Estate Agents, 01539 815700

Edward Seymour, Berwick upon Tweed, Edwin Thompson, 01289 304 432, e.seymour@edwin-thompson.co.uk

Keith Johnson FRICS, Durham, JW Wood, 01913869921, www.jww.co.uk, g.graham@jww.co.uk

Keith Pattinson FRICS, Newcastle, Keith Pattinson, 07770602155, keith.pattinson@pattinson.co.uk

Mr T H Brannen Frics FRICS, Coastal / Newcastle, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk

Neil Foster FRICS, Northumberland, Foster Maddison Property Consultants, 01434 605441

Paul Mckimmings BSc (Hons) MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com

Peter Bartley MRICS, Durham City, Bradley Hall, 0191 3839999, peter@bradleyhall.co.uk

Richard Harkness MRICS, Kirkby Lonsdale, Hackney & Leigh, richardharkness@hackney-leigh.co.uk

Richard Towler MRICS, Penrith, Eden Lettings & Management, enquiries@edenletting.co.uk

Simon Bainbridge MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com

Yorkshire & Humberside

Alex Mcneil MRICS, Huddersfield, Bramley, 01484 530361, alex.mcneil@bramleys1.co.uk

Chris Clubley FRICS FAAV, Market Weighon, York, Clubleys, 01430 874000, www.clubleys.com, mw@clubleys.com

David Blagden FRICS, Harrogate, e.surv, 01423 531696, www.esurv.co.uk, david.blagden@esurv.co.uk

David J Martindale MRICS, Wakefield, FSL, david.martindale@fslea.com

David Pank FRICS, Leeds and Wakefield, Manning Stainton, www.manningstainton.co.uk, dpank50@gmail.com

I Adams MRICS, East Riding Of Yorkshire, Metropolis Surveyors, ianadams31@yahoo.co.uk

James Brown MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk

John E Haigh MRICS FAAV, Knaresborough, Lister Haigh (Knaresborough) Ltd, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk

Ken Bird MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk

Mark J Hunter MRICS, Doncaster, Grice and Hutner, 01302 360141, www.gricehunter.co.uk, griceandhunter@btconnect.com

Michael Beech MRICS, Skipton, WBW Surveyors Ltd, 01756 692900, www.wbwsurveyors.co.uk, michael@wbwsurveyors.co.uk

N P Wood MRICS, Bradford, Yorkshire Property Surveyors, wood.nick78@yahoo.co.uk

Paul Cunniff AssocRICS, Yorkshire, Charters Reid Surveyors Limited, fandpc@ntlworld.com

Pete Shield FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com

Peter Green, Halifax, Brearley-Greens, 01422 330088

Peter M Mawer FRICS, Bridlington, Cranswicks, info@cranswicks.com

Philip Hayton APC, Leeds, Leeds Fed, 01133861137, www.leedsfed.com, philip.hayton@lfha.co.uk

R J Newton-Howes MRICS, Huddersfield & Sheffield, Yorkshire Surveyors Limited, robert@yorkshiresurveyors.com

Richard Graves FRICS, Bridlington, D. Dunk, Lewis & Graves, richardgraves@btconnect.com

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 501211

Simon Dee MRICS, Driffield, Dee Atkinson & Harrison, 01377 241919, www.dee-atkinson-harrison.co.uk, simon@dee-atkinson-harrison.co.uk

William Marshall, Leeds, Adair Paxton, 0113 205 4190

North West

Andrew Hart MRICS, Bollington, Macclesfield, Michael Hart & Co Ltd, 01625 575578, www.michael-hart.co.uk, andrew@michael-hart.co.uk

Derek Coates MRICS, Liverpool, Venmore, 0151 236 0301, www.venmore.co.uk, d.coates@venmores.co.uk

Ed Goodwin, Northwich, Wright Marshall, 01606 41318, wrightmarshall.co.uk, edgoodwin@wrightmarshall.co.uk

Ian Macklin FRICS, Hale Hale Barns Timperley, Ian Macklin & Company, 0161 980 8011, www.ianmacklin.com, halebarns@ianmacklin.com

James Leech AssocRICS, Preston, Lea Hough & Co, jleech456@aol.com

John Halman FRICS, South Manchester, Gascoigne Halman., 01625 460344, jane@gascoignehalman.co.uk

John Williams FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 01513439060, www.b-a-o.com, john@b-a-o.com

M G Fell FRICS, Birkenhead, T.H.Woodhouse and Co., 0151 608 9776, thwoodhouse.co.uk, mikefell@thwoodhouse.co.uk

Martin Gallagher, Bury, Entwistle Green, martin.gallagher@entwistlegreen.co.uk

Robert J Ikin FRICS, Tarporley, Wright Marshall, 01829 731300, robertikin@wrightmarshall.co.uk

Roger Hardwick MRICS, Lancashire and Cumbria, Right Surveyors Cumbria/Lancs Ltd, rogershardwick@hotmail.co.uk

Simon Wall FRICS, Southport, Wall & Macnab Ltd, 01704 872035, www.simonwall.com, simon@simonwall.com

East Midlands

Andrew W York FRICS, Leicester, Moore & York Ltd, 0116 2558666, mooreandyork.co.uk, andrew.york@mooreandyork.co.uk

C Ball MRICS, Buxton, Bury & Hilton, charles@buryandhilton.co.uk

Chris Beeby DipREA FNAEA MARLA AssocRICS, Thrapston, Bletsoes, 01832 732188, bletsoes.co.uk, chris.beeby@bletsoes.co.uk

Chris Charlton FRICS, Nottingham, Savills, 0115 9348020, www.savills.com, ccharlton@savills.com

Christopher Shallice FRICS FAAV, Lincolnshire, Hix & Son, 01406 422 777

David Hammond BSc FRICS, Nottingham, David Hammond Chartered Surveyors., 01773 767776, residential@dvdhammond.co.uk., residential@dvdhammond.co.uk

Surveyor contact details

David Hawke FRICS,
Nottinghamshire, David Hawke &
Co., 01909 531450

Ian J Shaw FRICS, Grantham,
escritt barrel golding, ian.shaw@
ebgproperty.co.uk

John Chappell BSc
(Hons) MRICS, Skegness,
Chappell & Co Surveyors
Ltd, 01754 769673, www.
skegnesssurveyors.co.uk, john@
chappellandcosurveyors.co.uk@

K J Gregory FRICS, Leicester,
Gregory Residential Ltd, kevin@
gregoryresidential.co.uk

Mark Newton FRICS, Grantham,
Newton Fallowell, 01476 591900,
www.newtonfallowell.co.uk,
mark.newton@newtonfallowell.
co.uk

Nicholas Richardson FRICS,
Beeston, Nottingham, Nicholas
Richardsons, 01159677589,
www.nicric.co.uk, nrichardson@
nicric.co.uk

Paul Jex AssocRICS, Derby,
Jex Surveyors, 03331210140,
www.jexsurveyors.co.uk, paul@
jexsurveyors.co.uk

Paul Perriam BSc (Hons)
MRICS, Nottingham, William H
Brown/Bagshaws Residential,
01332 542299, www.
sequencehome.co.uk, paul.
perriam@sequencehome.co.uk

Peter Buckingham, Market
Harborough, Andrew Granger
& Co, 01858 431315, www.
andrewgranger.co.uk, peter.
buckingham@andrewgranger.
co.uk

Phil W Morley MRICS,
Skegness, Phil W Morley,
philwmorley@yahoo.co.uk

Roderic Turner FRICS,
Skegness, Turner Evans
Stevens, roderic.turner@tes-
property.co.uk

Simon Bentley MRICS, Lincoln,
Mundys Property Services LLP,
01522 510044, www.mundys.net,
simon.bentley@mundys.net

Stephen King FRICS, Market
Harborough, King West,
01858435970, www.kingwest.
co.uk, sjking@kingwest.co.uk

Steve Gadsby BSc FRICS,
Derby, Gadsby Nichols, 01332
296396, www.gadsbynichols.
co.uk, stevegadsby@
gadsbynichols.co.uk

West Midlands

Alexander Smith FRICS,
Birmingham, Alex Smith &
Company, 0121 784 6660, alex-
smith.co.uk, alex@alex-smith.
co.uk

Andrew Pearce MRICS,
Wolverhampton, Millennium
Properties, 01902 836036

C Ball MRICS, Leek, Bury &
Hilton, charles@buryandhilton.
co.uk

Colin Townsend MRICS,
Malvern, John Goodwin, 01684
892809, www.johngoodwin.
co.uk, colin@johngoodwin.co.uk

D J Satchwell FRICS,
Coventry, Marston
Management, d.j.satchwell@
marstonmanagemnet.com

Dean Taylor MRICS, Harborne/
Birmingham, JPTaylor, 0121
4284333, www.jptaylor.co.uk,
dean@jptaylor.co.uk

J J Dell MRICS FAAV, Oswestry,
J J Dell & CO, 01691 653437,
www.jjdell.co.uk, property@jydell.
co.uk

Jeremy Jehan MRICS, Hereford,
Brightwells, 01432 261325,
brightwells.com, jeremy.jehan@
brightwells.com

John Andrews FRICS
IRRV, Bewdley / Bridgnorth
/ Kidderminster / Stouport,
Doolittle & Dalley, 01562 821600

M Cooper FRICS, Coventry,
Coopers, mc@coopers-cov.com

Mark Wiggin MRICS, Ludlow,
Strutt and Parker, mark.wiggin@
struttandparker.com

Mike Arthan FRICS, Shropshire,
Barbers, m.athan@barbers-
online.co.uk

Nicholas Lamb MRICS,
Birmingham, Naismiths, 0121
2623450, www.naismiths.com,
nicholas.lamb@naismiths.com

Nicholas Wint FRICS,
Birmingham, Johnson Fellows,
nick.wint@johnsonfellows.co.uk

Paul Britten FRICS, Warwick,
Godfrey-Payton, 01926 492511,
www.godfrey-payton.co.uk,
paul@godfrey-payton.co.uk

Peter Cornford FRICS, Henley In
Arden, John Earle, 1564794343,
peter.c@johnearle.co.uk

R J Stanley FRICS, Stourbridge,
Legal and General Surveying
Services, richard.stanley@
lgsurvey.co.uk

R. R. Williams FRICS, Hay-On-
Wye, Herefords., McCartneys,
ryan@mccartneys.co.uk

Richard Franklin BSc (Hons)
MRICS, Worcestershire, Franklin
Gallimore, 01584 810436

Richard Selby MRICS,
Birmingham, Knight Frank, n/a,
richard.selby@knightfrank.com

Rosemary Cheadle AssocRICS,
RICS Registered Valuer,
Wolverhampton, Worthington
Estates, enquiries@
worthingtonestates.co.uk

Stephen Barber, Stafford,
Bridgfords, 01785
212112, stephen.barber@
bridgfordscountrywide.co.uk

Stephen Smith MRICS, Walsall,
Fraser Wood, 01922 629000

Stewart H Sherman MRICS,
Birmingham, Chamberlains
Chartered Surveyors,
0124284290, www.
chamberlainssurveyors.
co.uk, stewart@
chamberlainssurveyors.co.uk

East Anglia

Chris Philpot FRICS,
Stowmarket, Lacy Scott and
Knight, cphilpot@lsk.co.uk

David H Knights MRICS,
Ipswich, David Brown &
Co, 01473 222266, www.
davidbrown-ipswich.co.uk,
mail@davidbrown-ipswich.co.uk

Ed Russell, Bury St Edmunds,
Jackson-Stops & Staff, 01638
662231

Ian Cook MRICS Registered
Valuer, Norwich, Hupton Cook
Limited, ian.cook@huptoncook.
co.uk

Jan Hytch, Norfolk, Arnolds
Keys, jan.hytch@arnoldskkeys.
com

Jeffrey Hazel FRICS, Norfolk,
Geoffrey Collins & Co., 01553
774135

Jonathan Pearson MRICS,
Registered Valuer, Suffolk,
Residentially Chartered
Surveyors, jlp@residentially.
co.uk

Mark Wood MRICS, Cambridge,
Carter Jonas, 01223 403330,
carterjonas.co.uk, mark.wood@
carterjonas.co.uk

Nicholas Rudge FRICS FAAV,
Suffolk, Durrants, 01502 712122

Nigel Steele FRICS, Norfolk,
Jackson-Stops, 01603 612333,
www.jackson-stops.co.uk, nigel.
steele@jackson-stops.co.uk

Rebecca Leggett, Norwich,
Arnolds Keys, rebecca.leggett@
arnoldskkeys.com

Tim Yeomans MRICS,
Nottingham/Derby, SDL
Surveying, 07795266361, tim.
yeomans@sdlssurveying.co.uk

Tom Good MRICS, Colchester,
Fenn Wright, tjg@fennwright.
co.uk

South East

Anthony Webb FRICS, Cobham,
Surrey, Trenchard Arlidge, 01932
864242, www.trenchard-arlidge.
co.uk, twebb@trenchard-arlidge.
co.uk

Ben Macintyre MRICS, Brackley,
Macintyers Ltd, 01280 701001,
www.macintyers.co.uk, ben@
macintyers.co.uk

Chris Clark FRICS, Chandler's
Ford, Eastleigh, Ely Langley
Greig, 023 80274211,
elgsurveyors.co.uk, chrisclark@
elgsurveyors.co.uk

Christopher Beadle, Billericay,
Essex, Bairstow eves, chris.
beadle@crldirect.co.uk

Surveyor contact details

Colin Bernhardt MRICS, Bognor Regis, Bernhardt Associates, bernhardt.assoc@btconnect.com

Craig Pilgrim MRICS Registered Valuer, West Berkshire, Pilgrim Bond, 01488 72911, www.pilgrimbond.co.uk, craig@pilgrimbond.co.uk

D J Bambrough FRICS, Milton Keynes, Connells Survey & Valuation, 01604790087, connells.co.uk, david.bambrough@connells.co.uk

David Boyden BSc MRICS, Colchester, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk

David Clifford-Smith MRICS, Chelmsford, Beresfords, 01245 422796, www.beresfords.co.uk, dcs@beresfords.co.uk

David Green FRICS, Eastbourne, David Green & Co, 01323 412776, www.davidgreen.uk.com, dg@davidgreen.uk.com

David M Lambley MRICS FAAV, South West Hampshire, Longdown Management Ltd, 023 8029 2107, dmlambley@longdown.uk.com

David Nesbit FRICS, Portsmouth, D.M.Nesbit & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk

David Parish FRICS, Upminster, Gates Parish & Co., 01708 250033

David Robinson MRICS, Westerham, karrison property, 01959 563888, david.robinson@karrison.co.uk

Ed Westmacott, Newbury, Carter Jonas, ed.westmacott@carterjonas.co.uk

Edward Rook MRICS, Sevenoaks, Knight Frank, edward.rook@knightfrank.com

Eoin Hill MRICS, Newbury, SDL Surveying, eoin.hill@talk21.com

Fiona Minx FARLA, Newbury, Berkshire, Carter Jonas, fiona.minx@carterjonas.co.uk

Glen Cameron MRICS, Welwyn Garden City, Esurv, glenjohncameron@hotmail.com

Guy West MRICS, Newbury, Westbuild Homes Ltd, gwest@westbuildhomes.co.uk

Harry Fenner, Leigh On Sea, Navana residential management limited, 02087610222, www.n-rm.co.uk, harry.fenner@n-email.co.uk

Howard Mecklenburgh MRICS, Watford, LPand M, howard@lpandm.co.uk

Ian Jones MRICS, Guildford, Ian Jones MRICS, cornerstonesurrey@hotmail.co.uk

Ian Perry FRICS, Faringdon Highworth Fairford Lechlade Witney, perry bishop and chambers, 01285 655355, perrybsihop.co.uk, ianperry@perrybishop.co.uk

James Collins MRICS, Stansted, Collins Homes Ltd, jim@grenville.uk.com

James Crawford BSc MRICS, London, Knight Frank, 0207 861 1065, knightfrank.com, james.crawford@knightfrank.com

James Farrance MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk

John Frost MRICS, Ashford / Gerrards Cross / Slough / Burnham / Langley, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk

Julian Wells MRICS, Tunbridge Wells, Nationwide, julianwells2@hotmail.co.uk

Kevin Waldron AssocRICS, Oxford, Kevin Waldron Property Surveyor, kevinwaldron_propertysurveyor@btinternet.com

Lee Cahill AssocRICS, Wickford Essex, CSS, lee.cahill@cwsurveyors.co.uk

Mark A K Lewis FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk

Mark Everett FRICS, Epsom, Michael Everett & Company, markeverett@michael-everett.co.uk

Martin Allen MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com

Martin Lee MRICS, Southend On Sea, Countrywide Surveyors, martin.lee@cwsurveyors.co.uk

Michael Brooker FRICS, Crowborough East Sussex, Michael Brooker, 01892-663377, sales@michaelbrooker.co.uk

Montague Howard MRICS, High Wycombe, Montague Howard associates, 01494 528006, www.mha-turnkey.co.uk, montaguehoward@tiscalic.co.uk

Mr Jeremy Q Fisher MARLA, Beaconsfield / Burnham / Langley / Gerrards cross / Feltham / Windsor, The Frost Partnership, 07776 297202, www.frostweb.co.uk, jeremy.fisher@frostlettings.co.uk

Nigel Sloper MRICS, Portsmouth, Finance Planning Surveying Services Limited, nigel.sloper@financeplanning.co.uk

Paul Christian Bird MRICS, Braintree Essex, Joscelyne Chase, 01376 322222, www.joscelynechase.co.uk, paul@joscelynechase.co.uk

Philip Hiatt MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, www.your-move.co.uk/eastgrinstead, eastgrinstead@your-move.co.uk

Rob Wightman MRICS, Hungerford, Knight Frank, knightfrank.com, rob.wightman@knightfrank.com

S B B Askaroff BSc (Hons) MRICS, Eastbourne, Estatewise, 01323 412010

Simon Deacon FRICS, Southend-On-Sea, Wheeldon & Deacon, 01702 344621

Stephen Hardman, Portsmouth, Countrywide, stephen.hardman@countrywide.co.uk

Stephen Wolfenden FRICS, Oxford, The County Homesearch Company, www.county-homesearch.com, oxfordshire@county-homesearch.com

Stuart Gray MRICS FAAV, St Albans, Strutt & Parker, 01727 738280, www.struttandparker.com, stuart.gray@struttandparker.com

Sylvia Stone MRICS, Dorking, White and Sons, sylvia.stone@whiteandsons.co.uk

Tim Green MRICS, South Oxfordshire, Green & Co., 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk

Tom Gooderham Graduate, Canterbury, Strutt & Parker, tom.gooderham@struttandparker.com

Tom White MRICS, Saffron Walden, Audley End Estate, tom.white@audleyendestate.co.uk

Tony Jamieson MRICS, Guildford, Clarke Gammon Welers, 01483 880900, www.clarkegammon.co.uk, jamieson@clarkegammon.co.uk

W T Peppitt MRICS, Cranbrook, Savills (UK) Ltd, wpeppitt@savills.com

South West

Ben Sharp MRICS, Bristol/North Somerset, esurv Chartered Surveyors, ben.sharp@esurv.co.uk

Chris Heal, Exeter, Whitton and Laing, 01392 259395, www.whittonandlaing.com, c.heal@whittonandlaing.com

Christopher Bailey MRICS, Exeter, Knight Frank, 01392848822, christopher.bailey@knightfrank.com

David Lewis Bsc (Hons), West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk

David Mckillop FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk

Surveyor contact details

David Slade FRICS,
Christchurch, Slades, 01202
474202, sladeshomes.co.uk,
david@sladeschristchurch.co.uk

David Trim MRICS, Gillingham,
Dorset, Chaffers Estate Agents
Limited, 01747 822233, www.
chaffersstateagents.co.uk,
dave@chaffersstateagents.
co.uk

G C Thorne FRICS, East Dorset,
Thornes chartered surveyors,
01202-684004, www.thornes.
org.uk, graham@thornes.org.uk

Hannah Isaacs, Taunton, Mayfair
Town & Country, hannah.
isaacs@mayfairproperties.net

Ian Perry FRICS, Cheltenham
Cirencester Nailsworth Stroud
Tetbury, perry bishop and
chambers, 01285 655355,
perrybishop.co.uk, ianperry@
perrybishop.co.uk

James Cullen FRICS; Registered
Residential Valuer, Swindon and
Environs, Colleys Surveyors,
jimcullen@halifax.co.uk

James Mckillop MRICS, South
West, Knight Frank, james.
mckillop@knightfrank.com

James Wilson MRICS,
Shaftesbury, Jackson-Stops,
01747 850858, jackson-stops.
co.uk, james.wilson@jackson-
stops.co.uk

Jeff Cole MRICS, Wadebridge,
Cole Rayment & White,
01208813595, www.crw.co.uk,
jeff.cole@crw.co.uk

Jeremy Priestley FRICS, Poole,
Berkeleys, 01202708383,
www.berkeleys.com, jeremy.
priestley@yougroup.co.uk

John Blake FRICS, Liskeard,
Jefferys, 01579342400, www.
jefferys.uk.com, johnblake@
jefferys.uk.com

John Corben FRICS, Swanage,
Corbens, john@corbens.co.uk

John Woolley FRICS, Salisbury,
John Woolley Ltd, 01722 325650,
www.johnwoolleyltd.co.uk,
john@johnwoolleyltd.co.uk

Lloyd Smale FRICS, RICS
Registered Valuer, Exeter,
Drew Pearce 1748 Ltd, 01392
201748, drewpearce.co.uk, lms@
drewpearce.co.uk

Matthew Harvey MRICS,
Cotswolds, Tayler & Fletcher,
01451820913, taylerandfletcher.
co.uk, matthew.harvey@
taylerandfletcher.co.uk

O F Miles FRICS, Swanage,
Oliver Miles, 01929 426655,
www.olivermiles.co.uk,
olivermiles@olivermiles.co.uk

Paul Mayes FRICS FCABE
MCMi IRRV(Hons), Swindon,
PLP Property Consultants,
lesley@plp.uk.com

Paul Oughton MARLA, MNAEA,
Cirencester and The Cotswolds,
Moore Allen & Innocent LLP,
01285648100, www.mooreallen.
co.uk, paul.oughton@
mooreallen.co.uk

Peter Olivey MRICS, Padstow,
Cole Rayment and White, 01841
533386, www.crw.co.uk, peter.
olivey@crw.co.uk

Phillippa Claire Stubbs
AssocRICS, Devon, Stags,
0182 612458, www.stags.co.uk,
p.stubbs@stags.co.uk

Robert Cooney FRICS, Taunton,
Robert Cooney Chartered
Surveyors & Estate Agents,
01823 230230, robertcooney.
co.uk, robert.cooney@
robertcooney.co.uk

Robert House FRICS,
Trowbridge and Melksham,
Kavanaghs, roberthouse@
kavanaghs.co.uk

Roger Punch FRICS, South
Devon, Marchand Petit, 01752
873311, www.marchandpetit.
co.uk, roger.punch@
marchandpetit.co.uk

Ross Harvey ARLA, Guildford,
Knight Frank, ross.harvey@
knightfrank.com

Simon Barker MRICS,
Sherborne, Knight Frank LLP,
simon.barker@knightfrank.com

Simon Cooper FRICS, Exeter,
Stags, 01392 255202, stags.
co.uk, s.cooper@stags.co.uk

Tim Maggs MRICS, Bristol,
Maggs & Allen, timm@
maggsandallen.co.uk

Wales

Andrew Morgan FRICS
FAAV, Lampeter, Morgan
& Davies, 01570423623,
morgananddavies.co.uk,
lampeter@morgananddavies.
co.uk

Anthony Filice FRICS, Cardiff,
Kelvin Francis Ltd., 02920
766538, www.kelvinfrancis.com,
tony@kelvinfrancis.com

D.H Martin FRICS, Newport /
Cwmbran, Newland Rennie,
01633 221441, newland rennie,
newport@newlandrennie.com

Darren Thomas MRICS, Brecon,
McCartneys, bp148thomas@
yahoo.co.uk

David James FRICS, Brecon,
James Dean, 01874 624757,
jamesdean.co.uk, david@
jamesdean.co.uk

David Owen Evans FRICS,
Rhayader, Clare Evans &
Co, 01597 810457, www.
clareevansandco.co.uk, clare.
evans@clareevansandco.co.uk

Emily James MRICS, Brecon,
James Dean, emily@jamesdean.
co.uk

Giles Birt BSc MRICS, Tenby,
Birt & Co, 01834 842204, www.
birtandco.co.uk, giles.birt@
birtandco.co.uk

Martine Harris MRICS, Cardiff,
Moginie James, martine@
moginiejames.co.uk

Paul Lucas FRICS,
Haverfordwest, R.K.Lucas
& Son, 01437762538, www.
rklucas.co.uk, paul@rklucas.
co.uk

Richard J Ormond FRICS,
Pembroke, Guy Thomas LLP,
guy1thomas@btconnect.com

Simon Edwards IRRV (Hons)
MRICS, Powys, McCartnetys
LLP, 01874 610990

London

Adam Sherley-Dale AssocRICS,
London, Grainger plc, 020 7940
9575, www.graingerplc.co.uk,
asherley-dale@graingerplc.co.uk

Alastair Iles MRICS, London, Iles
Property, alastair@ilesproperty.
co.uk

Alastair Mason FRICS, Hackney
/ London, Bunch & Duke, 020
8986 3521, www.bunchandduke.
com, hackney@bunchandduke.
com

Alexander Millett MRICS,
Knightsbridge, Alexander Millett,
alexander@alexandermillett.com

Allan Fuller MRICS, Putney,
Allan Fuller Estate Agents,
02087888822, www.allanfuller.
co.uk, allan@allanfuller.co.uk

Andrew Cook, London, M&G RE,
andrew.cook@mandg.com

Anthony Lee MRICS, London,
BNP Paribas Real Estate,
anthony.lee@bnpparibas.com

B K Bhalla MRICS, HI,
CEA, Heathrow - Hounslow,
Acrewoods, 0208 5775733,
www.acrewoods.com,
enquiries@acrewoods.com

Chariton Symeou MRICS,
Islington, Hanley Estates
LTD, 02075615502, www.
hanleyestates.com, harry@
hanleyestates.com

Christopher Ames MRICS,
Belgravia, Ames Belgravia,
02077301155, amesbelgravia.
co.uk, ca@amesbelgravia.co.uk

Christopher Green FRICS,
London, Curzon Land, cgreen@
curzonland.com

Georgia Solaja AssocRICS,
London, Colin Bibra Estate
Agents Ltd, slagio@aol.com

Henry Wilson, London E1W,
Cluttons, 020 7488 4858, www.
cluttons.com, henry.wilson@
cluttons.com

Ian Skinner FRICS, Eltham,
Bernard Skinner, ian@
bernardskinner.co.uk

Surveyor contact details

Ian Wilson AssocRICS, London, Countrywide, ianwilson9@gmail.com

J.J.King FRICS, Wimbledon / Merton, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk

James Gubbins MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk

James Perris MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk

Jeff Doble FRICS, London, Dexters, jeffdoble@dexters.co.uk

Jeremy Leaf FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk

Jilly Bland John Collard MRICS, Wimbledon, Robert Holmes & Co, 0208 879 9669, www.robertholmes.co.uk, jilly@robertholmes.co.uk

Kanishka Bodh AssocRICS, London, KB Property Partners, kenbodh@gmail.com

Kathy MRICS, London, DLS, happykathyc@hotmail.com

Kevin Ryan FRICS, Mayfair, Carter Jonas LLP, kevin.ryan@carterjonas.co.uk

Louise Bell MRICS, London, The Estate Office shoreditch, louise_37@hotmail.com

Mac MRICS, London, Macneel, maclal66@gmail.com

Mark Wilson MRICS, London, Globe Apartments, 020 7034 3435, www.globeapt.com, mark@globeapt.com

Matt Bownik MRICS, London, Daniel Watney, mbownik@danielwatney.co.uk

Michael Pollard MRICS, London, Pollards, 020 8859 3811

Nieves, Hyde Park and Marylebone, Cluttons, nieves.muros@cluttons.com

Olusoyi Richard Ashaye MRICS, London, Slough Borough Council, tokash38@hotmail.com

P Wright MRICS, Sidcup, MAP Surveyors, paw@mapsurveyors.co.uk

Peter Gunby MRICS, Ilford, B. Bailey & Co Ltd, enquiries@bbailey.co.uk

Richard Taylor Bsc (Hons) MRICS, London, London's Surveyors and Valuers, richard@lcsv.co.uk

Robert King, Middlesex, Jackson-Stops & Staff, 020 8943 9777

Simon Aldous MRICS, London, London, 02070163861, savills.co.uk, saldous@savills.com

Stephen Birtwistle MRICS, London, Daniel Watney LLP, sbirtwistle@danielwatney.co.uk

Suzanne Green MRICS, London, Westward rose Ltd, 07411931845, www.westwardrose.com, suzanne@westwardrose.com

Terry Osborne FRICS, Sw1, Tuckerman Residential Ltd, 020 7222 5510, tosborne123@yahoo.com

Tom Dogger MRICS, London, BN Investment Ltd, tdogger@bninvestment.co.uk

Will Barnes Yellowley AssocRICS, Kensington London, LHH Residential, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk

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

Scotland

Adrian Stott FRICS, Lothians, J and E Shepherd, 01316533456, shepherd.co.uk, a.stott@shepherd.co.uk

Alasdair Hayworth FRICS, Glasgow, Walker Fraser Steele, 0141 221 0442, www.walkerfrasersteele.co.uk, alasdair.hayworth@walkerfrasersteele.co.uk

Alasdair J Cameron BSc (Hons) MRICS, Ayrshire, Graham + Sibbald, acameron@g-s.co.uk

Alex Inglis MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com

Allan Cameron BSc FRICS, Falkirk, Walker Fraser Steele (esurv), allan.cameron@walkerfrasersteele.co.uk

Ben Fox MRICS, Edinburgh, Savills, 0131 247 3736, bfox@savills.com

Carolyn Davies MRICS, Dumfries, Savills, 01387 263066, www.savills.co.uk, cmadavies@savills.com

Chris Hall MRICS, Edinburgh, Rettie and Co, chris.hall@rettie.co.uk

David Cruickshank MRICS, Elgin, D M Hall, 01343 548 501, david.cruickshank@dmhall.co.uk

Fraser Crichton MRICS, Edinburgh, Dove Davies, 01312283999, www.dovedavies.com, fcrichton@dovedavies.com

GP Duff MRICS, Argyll, DM Hall, gary.duff@dmhall.co.uk

Graeme Gilchrist MRICS, Tayside, Graham + Sibbald, 01382 200064, www.g-s.co.uk, graeme.gilchrist@g-s.co.uk

Graeme Lusk BSc MRICS, Glasgow and Renfrewshire, Walker Fraser Steele, 01412480038, www.walkerfrasersteele.co.uk, graeme.lusk@walkerfrasersteele.co.uk

Iain Swayne FRICS, Dunfermline and West Fife, DM Hall, iain.swayne@dmhall.co.uk

Ian Morton MRICS, St andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk

Jason Begg MRICS, Aberdeen, J & E Shepherd, 01224 202800, j.begg@shepherd.co.uk

John Brown FRICS, Edinburgh, John Brown and Company, 07768 583 919, jb-uk.com, john.brown@jb-uk.com

John Gell MRICS, Inverness, Simply Let, 01463 718888, www.simplylet.biz, john.gell@simplylet.biz

Kevin I Angus MRICS, Aberdeen, J & E Shepherd, 01224 202800, www.shepherd.co.uk, kevin.angus@shepherd.co.uk

Kevin Macdonald MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, kmacdonald@g-s.co.uk

Marion Currie AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com

Michael Jones MRICS, Rural Scotland, Knight frank, michael.jones@knightfrank.com

Neil Woodhead FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co

Paul Taylor MRICS, Dundee, J & E Shepherd, 01382 200454

Peter Drennan BSc MRICS, Edinburgh, Allied Surveyors Scotland, 0131 226 6518, peter.drennan@alliedsurveyors.scotland.com

Rachel Bromby MRICS, Nairn, Cawdor Estate, rachel@cawdor.com

Robin Smith MRICS, Dundee/ Angus/Fife, Walker Fraser Steele, robin.smith@walkerfrasersteele.co.uk

Ronald G Smith MRICS, East Dunbartonshire/North Lanarkshire, Shepherd Chartered Surveyors, 01236 780000, www.shepherd.co.uk, ronnie.smith@shepherd.co.uk

Thomas Baird MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, www.selectsurveyors.co.uk, reception@selectsurveyors.co.uk

Surveyor contact details

Tom Murray AssocRICS, RICS
Registered Valuer, Girvan, South
Ayrshire, Galloway & Ayrshire
Properties, 01465 713498,
www.gapinthemarket.com, tom.
murray@gapinthemarket.com

Tony Perriam MRICS, Scottish
Borders, Rettie Borders, 01896
824070, www.rettie.co.uk, tony@
rettie.co.uk

Northern Ireland

Aidan Conway MRICS,
Londonderry, P Andrews
Chartered Surveyors,
02871263635, www.
andrewscharteredurveyors.
co.uk, info@patandrews.co.uk

Alan Russell MRICS,
Newtownards, Russell Brothers,
info@russellbrothers.co.uk

Andrew Smyth, Belfast,
Macfarlane & Smyth,
02890325888, macfarlanesmyth.
com, andrew.smyth@
macfarlanesmyth.com

Daniel Mc Leron FRICS,
Omagh, Co. Tyrone, Mc Leron
Estate Agents, 02882 242772,
www.mcleronestateagents.com,
info@mcleronestateagents.com

Eoin Lawless FRICS, Newry,
Eoin Lawless Estate Agents,
info@lawlessestateagent.co.uk

Heather Rountree AssocRICS,
Belfast, Macfarlane & Smyth,
02890 325888, heather.
rountree@macfarlanesmyth.com

Joanne Glover MRICS,
Downpatrick, Alexander Reid
& Frazer, 02844619966, www.
alexanderreidfrazer.com,
joanne@alexanderreidfrazer.
com

Keith Mitchell MRICS, Belfast,
Keith Mitchell, km242home@
gmail.com

Kirby O'Connor AssocRICS,
Belfast, GOC Estate Agents,
02890662366, www.
gocestateagents.com, kirby@
gocestateagents.com

Norman Russell MRICS,
Newtownards, Russell Brothers,
028 9181 2145

Paul Birt MRICS, Magherafelt,
Paul Birt Estate Agents, mail@
paulbirt.co.uk

Samuel Dickey MRICS
Spokesperson for NI, Belfast,
Simon Brien Residential,
02890595555, www.simonbrien.
com, sdickey@simonbrien.com

Siobhan Phillips, Newry,
Best Property Services,
02830266811, siobhan@
bestpropertyservices.com

Stephen Fitzpatrick MRICS,
Newry and Mourne, Stephen
Fitzpatrick & Co. Estd.1881,
02830265533, www.stephen
fitzpatrick.co.uk, info@
stephenfitzpatrick.co.uk

Stephen Henry AssocRICS,
Dungannon, Tom Henry &
Co, 02887726992, www.
tomhenryandco.com, stephen@
tomhenryandco.com

Contacts

Economics Team

Janet Guilfoyle

Market Surveys Administrator

+44(0)20 7334 3890

jguilfoyle@rics.org

Simon Rubinsohn

Chief Economist

+44(0)20 7334 3774

srubinsohn@rics.org

Jeffrey Matsu

Senior Economist

+44(0)20 7695 1644

jmatsu@rics.org

Sean Ellison

Senior Economist

+65 68128179

sellison@rics.org

Tarrant Parsons

Economist

+44(0)20 7695 1585

tparsons@rics.org

Kisa Zehra

Economist

+44(0)20 7965 1675

kzehra@rics.org

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Americas

Latin America

ricsamericalatina@rics.org

North America

ricsamericas@rics.org

Asia Pacific

ASEAN

ricsasean@rics.org

Greater China (Hong Kong)

ricshk@rics.org

Greater China (Shanghai)

ricschina@rics.org

Japan

ricsjapan@rics.org

Oceania

oceania@rics.org

South Asia

ricsindia@rics.org

EMEA

Africa

ricsafrica@rics.org

Europe

ricseurope@rics.org

Ireland

ricsireland@rics.org

Middle East

ricsmiddleeast@rics.org

United Kingdom RICS HQ

contactrics@rics.org