



June 2018: UK Residential Market Survey

Medium term expectations cast doubt on supply response

- Activity indicators suggest subdued picture will persist
- Improvement in New Instructions may be short-lived given appraisals data
- Twelve-month and five-year price and rent expectations consistent with new supply disappointing

The June 2018 RICS Residential Market Survey results continue to point to a broadly stable picture, at least as far as the headline numbers are concerned. However, the generally subdued tone to the aggregated data is still masking materially divergent trends at a more localised level.

Significantly, the Newly Agreed Sales net balance reading of -7% was the sixteenth successive month in which this metric produced a negative result. This series has a good record as a lead indicator (by around two quarters) of HMRC and Land Registry transactions data and suggests that the modestly softer trend in sales volumes compared with last year (around three per cent lower) will persist over the coming months. Indeed, to the extent that the New Buyer Enquiries series provides a gauge as to the appetite from potential purchasers to acquire property (this series is well correlated with data on mortgage approvals), there is little reason to expect any uplift in sales volumes during the second half of the year. Consistent with this generally uninspiring picture is the rise in time it is taking to complete a property sale from initial listing. This has edged up on the RICS measure from around sixteen weeks in the spring of last year to around eighteen weeks on average at present.

The Residential Survey has in the past highlighted a lack of available second-hand stock as a key impediment to the efficient functioning of the market. It would be presumptuous to conclude at this point that this issue is lessening in importance as an obstacle, particularly as the average inventory of unsold supply per estate agent branch still remains close to historic lows at 43. This series has, however, edged up in each of the last four months, albeit only very marginally.

Moreover, the New Instructions net balance has recorded positive numbers for two consecutive months; this is the first time that this has been the case since the early part of 2016. However, whether this can be sustained remains to be seen especially as the run rate on new appraisals of property by valuers is still reportedly down on the same period last year for the whole country. A cautious view on activity is also justified by the (twelve-month) Sales Expectations series which saw the net balance slip to zero, the lowest figure since October last year.

Meanwhile, the headline Price Balance edged up to +2% in June compared with -2% in May. This is the thirteenth month in a row in which the reading for this indicator has been in a range of +/- 10% and is suggestive of the flattish price picture persisting in the near term. That said, it is noteworthy that twelve-month Price Expectations remain in positive territory, even if somewhat less so than previously. Looking further out, the five-year series is still pointing to cumulative house price gains of more than twelve per cent which casts some doubt on the likely uplift in housing supply over this period and the ability of current policies to address the affordability crisis.

Disaggregating the data, it is noticeable that with the exception of London (-41% net balance), the South East (-27%) and East Anglia (-10%) all other parts of the country are recording results consistent with further (if in most cases modest) house price growth. The Newly Agreed Sales data is displaying a little more monthly volatility at a country/regional level but the South East is showing the most consistent negative set of results with London not far behind. At the other end of the scale, the feedback for Northern Ireland and Scotland suggests these two areas are displaying greater resilience.

An ongoing theme from the lettings results is the drop in new instructions coming through to agents. The latest data forms part of the non-seasonally adjusted monthly series (the updated quarterly seasonally adjusted numbers will be published next month). It shows a further drop in instructions during June (-22% net balance); this is the twenty first consecutive month in which the feedback has pointed to lower fresh supply of rental properties coming to market. Anecdotal remarks, unsurprisingly, draw attention to role the change in tax treatment on investment property has played in driving this trend. The Rent Expectations series is pointing to further modest increases over the course of the next twelve months with the deteriorating imbalance between demand (which remains solid) and supply underpinning the trend beyond this time horizon (a cumulative average of around fifteen per cent is projected over the course of the next five years).

*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:

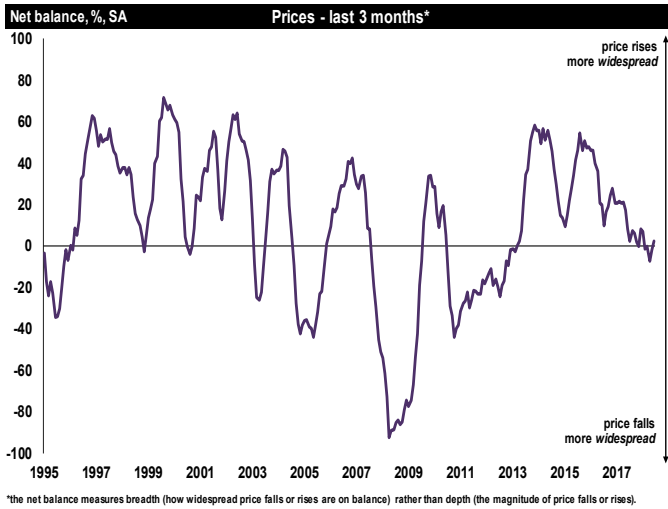
- July Survey: 9 August**
- August Survey: 13 September**
- September Survey: 11 October**

Number of responses to this month's survey:

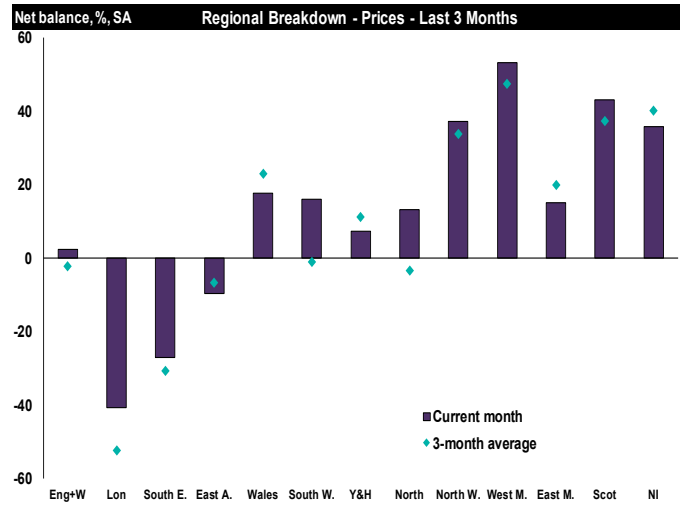
- This survey sample covers 749 branches coming from 300 responses

Sales market charts

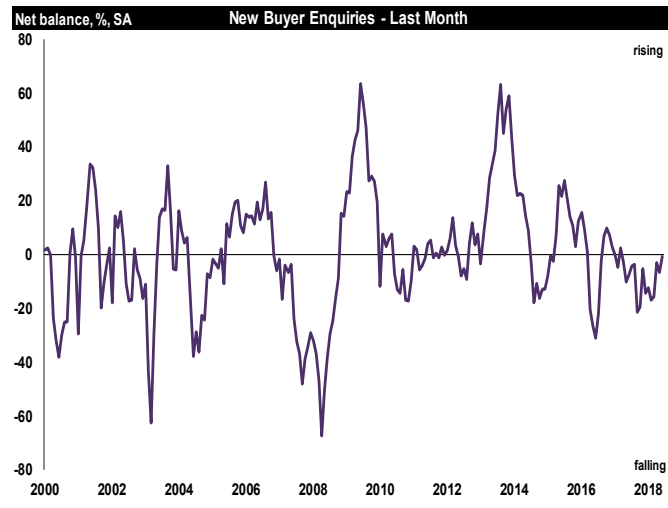
National Prices - Past three months



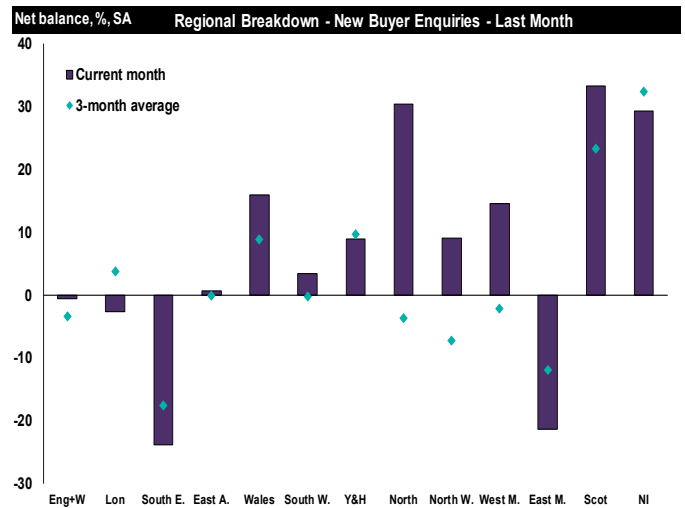
Regional Prices - Past three months



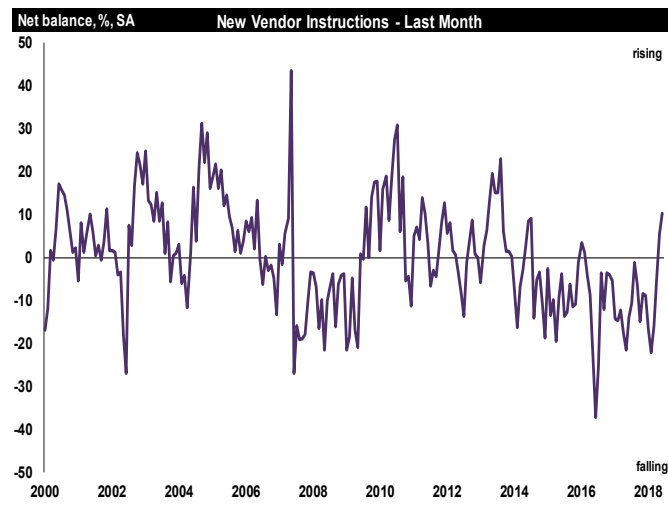
National Enquiries - Past month



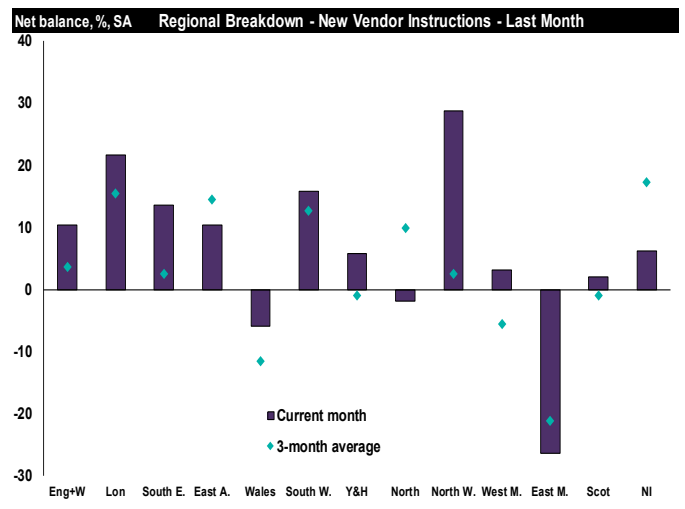
Regional Enquiries - Past month



National New Vendor Instructions - Past month

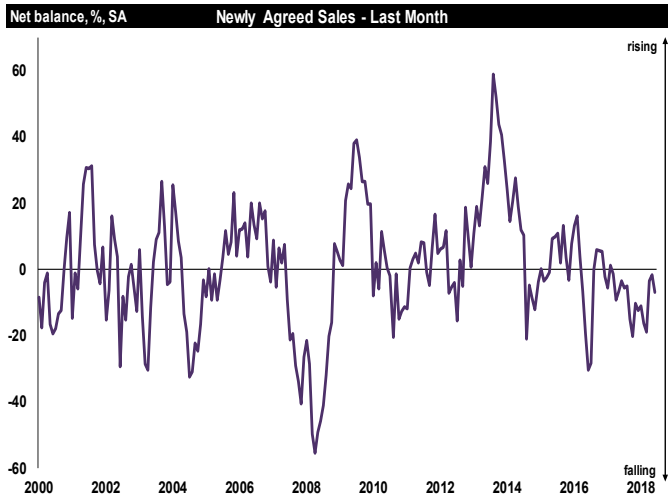


Regional New Vendor Instructions - Past month

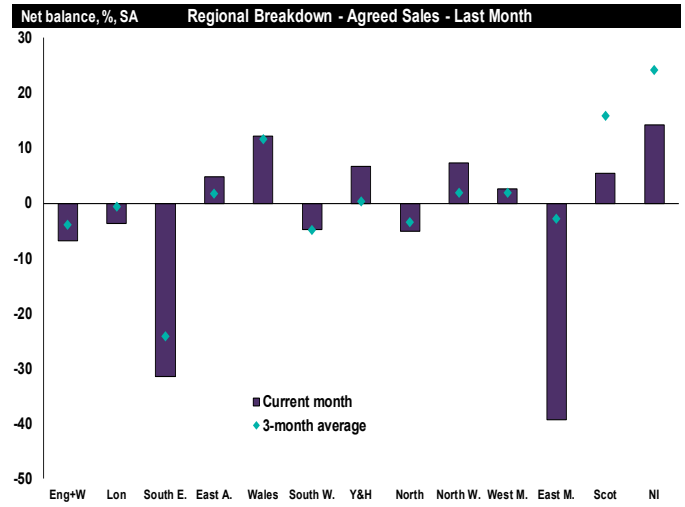


Sales market charts

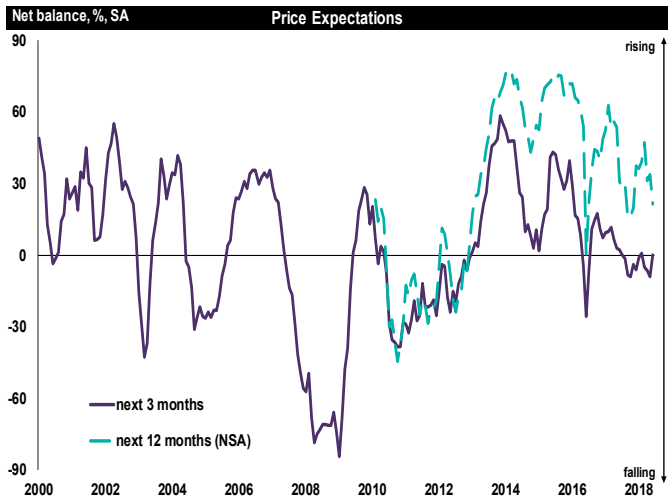
National Newly Agreed Sales - Past month



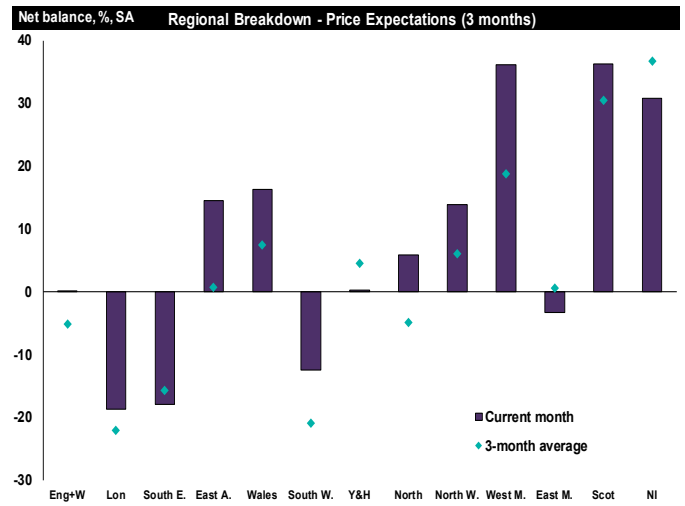
Regional Newly Agreed Sales - Past month



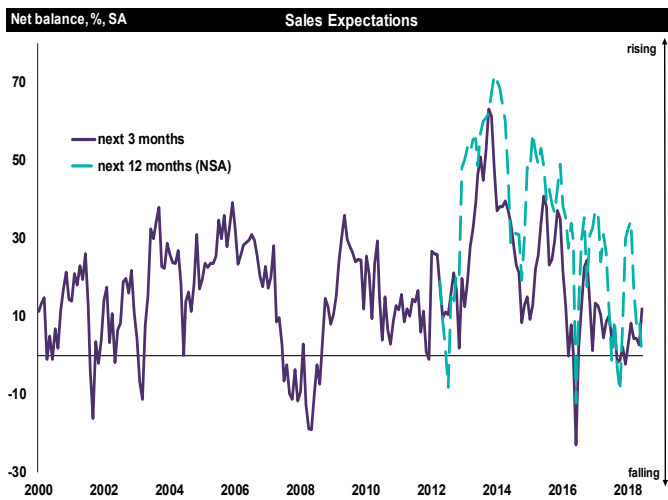
National Price Expectations - Three and twelve month expectations



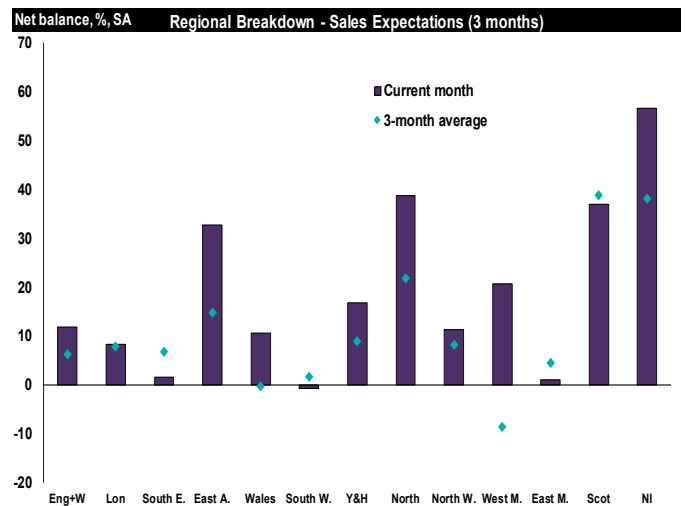
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

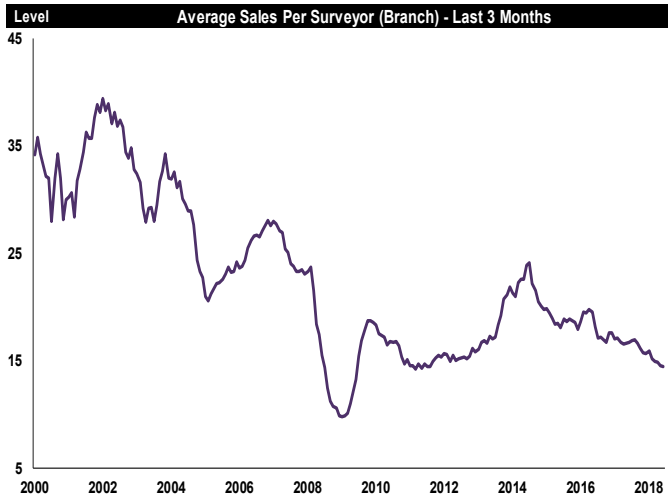


Regional Sales Expectations - Next three months

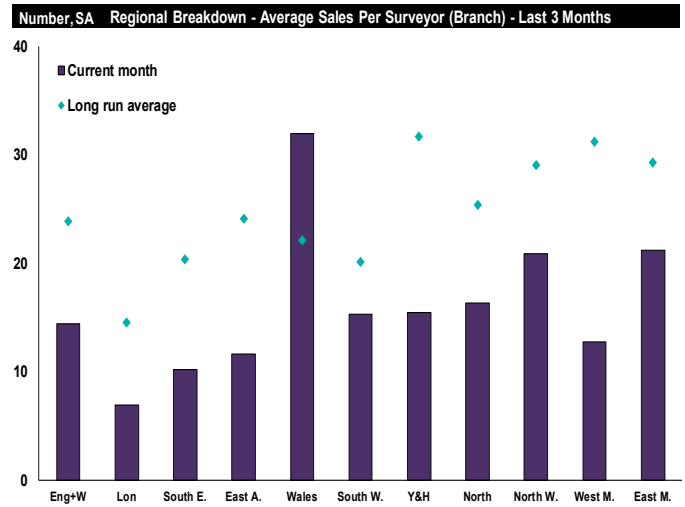


Sales market charts

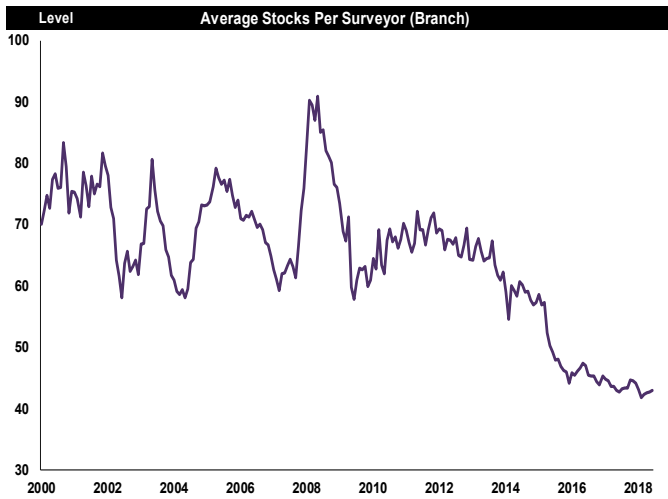
National Average Sales Per Surveyor - Past three months



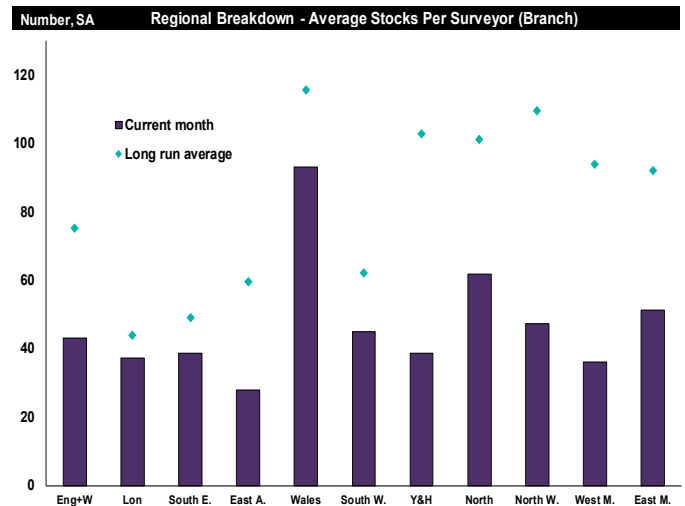
Regional Average Sales Per Surveyor - Past three months



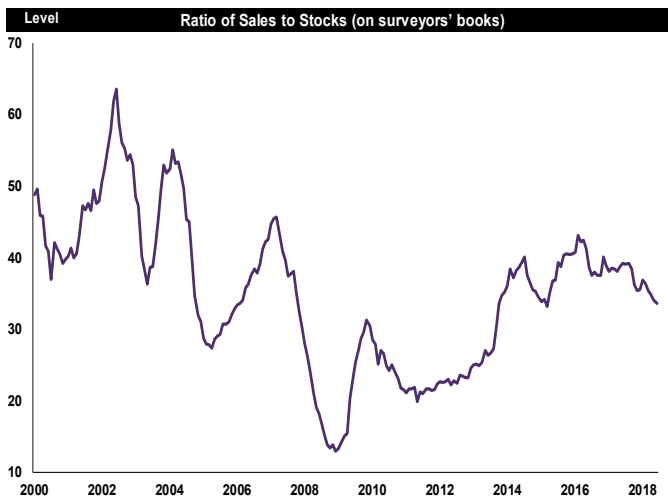
National Average Stocks Per Surveyor



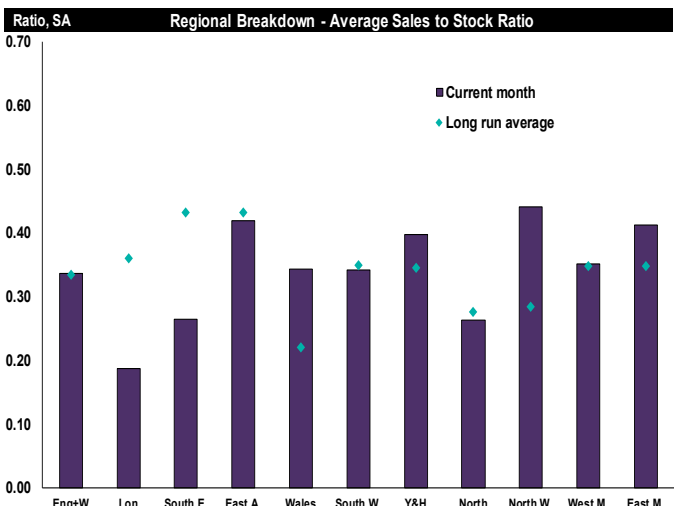
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

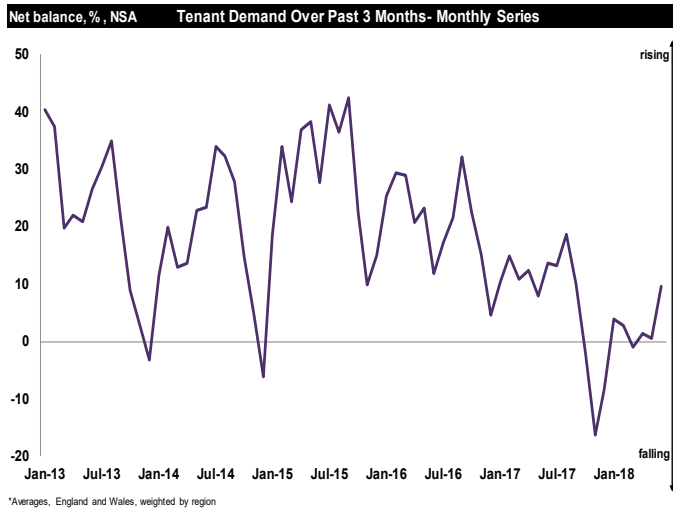


Regional Sales to Stock Ratio

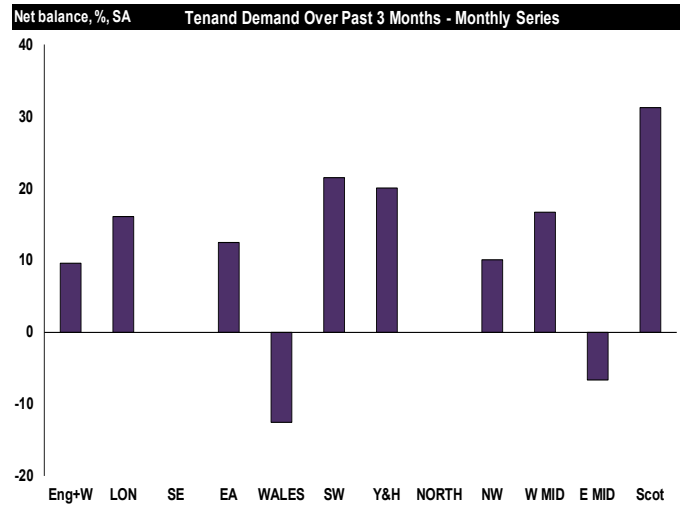


Lettings market charts

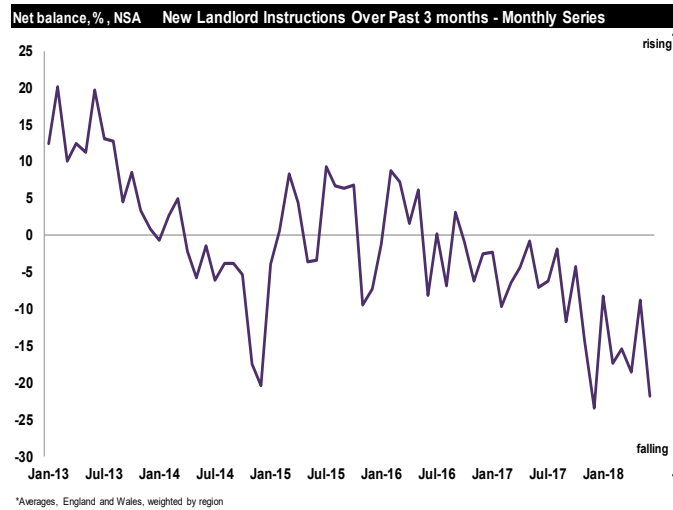
National Tenant Demand - Past three months



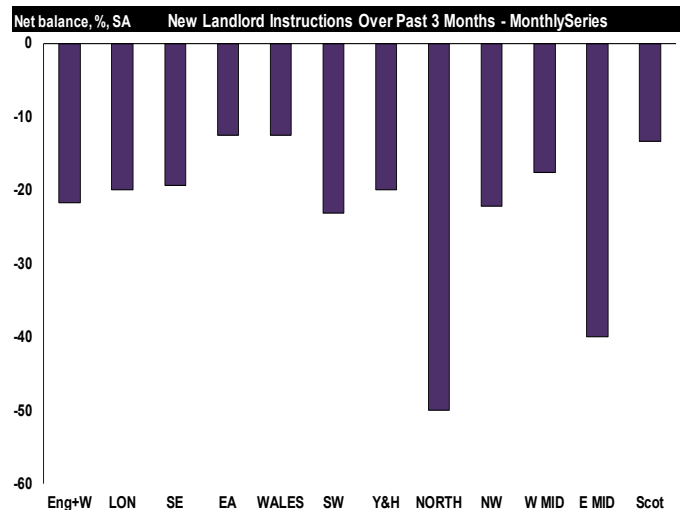
Regional Tenant Demand - Past three months



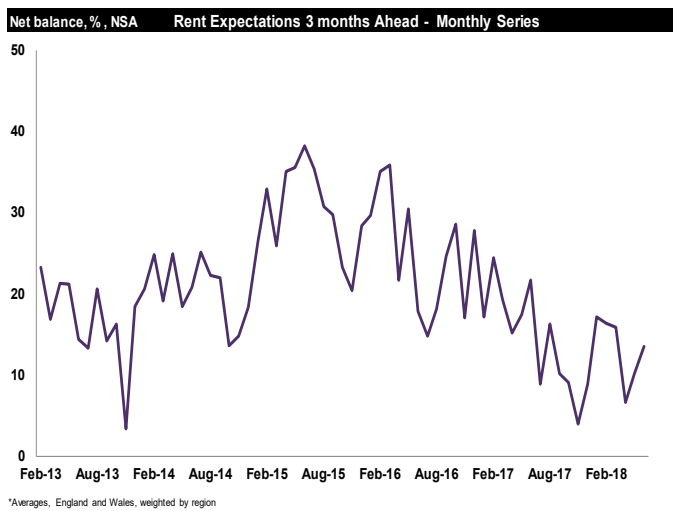
National New Landlord Instructions - Past three months



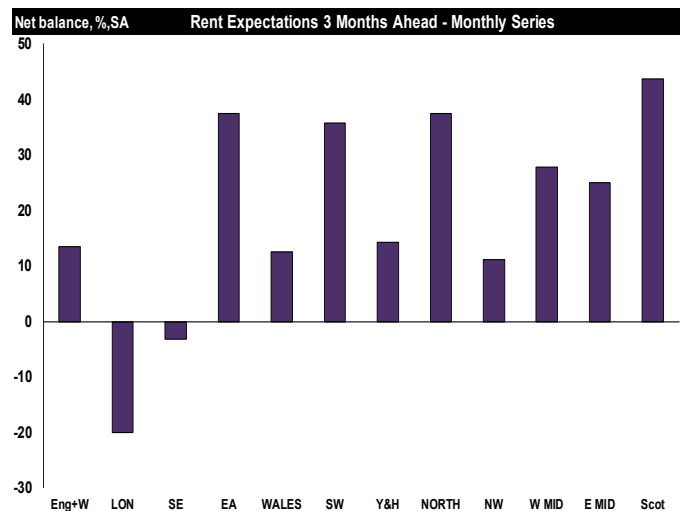
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

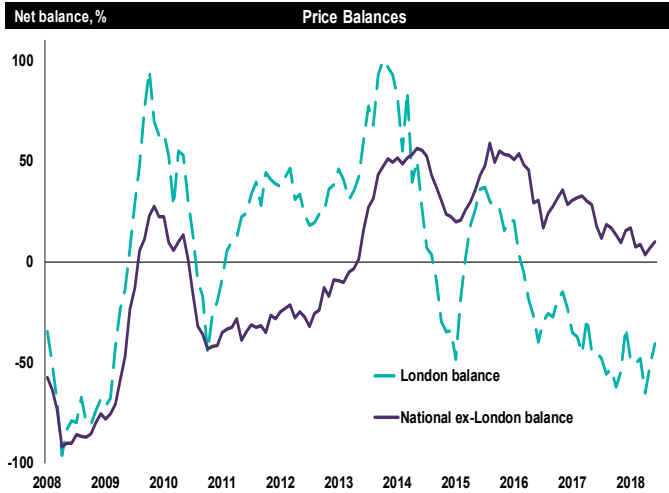


Regional Rent Expectations - Next three months

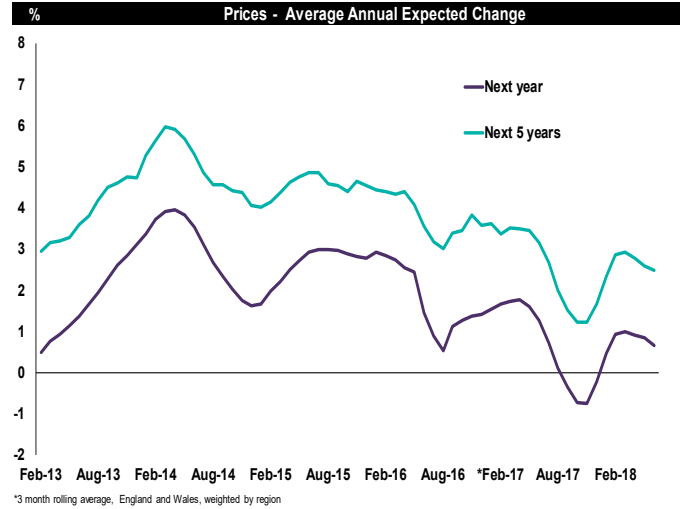


Expectations & other data

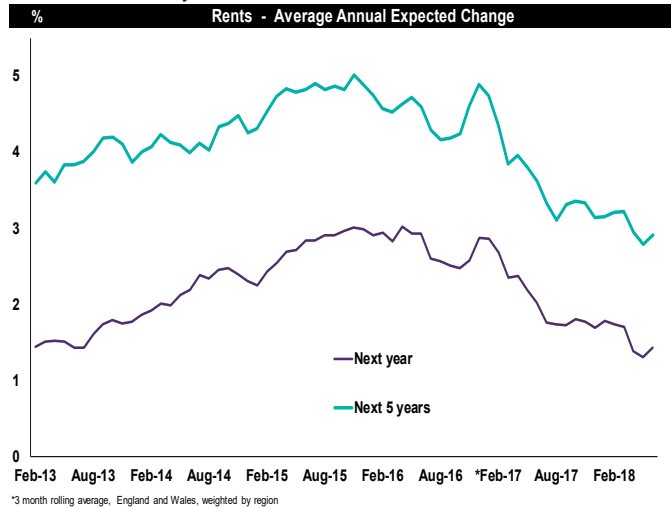
National Price Balance (excluding London) and London Price Balance - Past three months



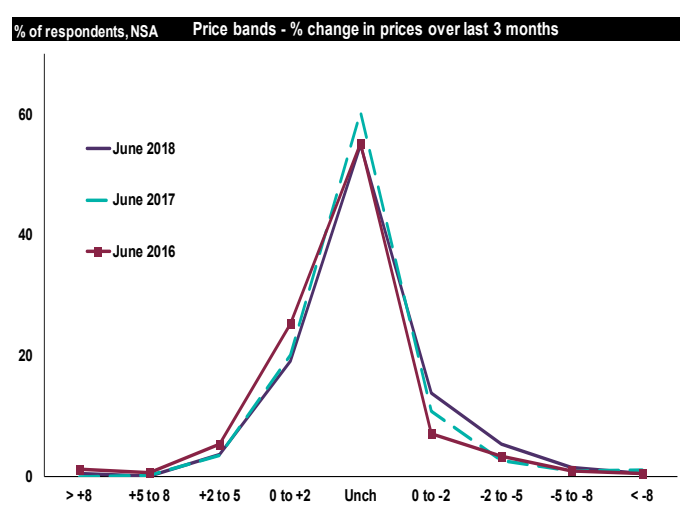
National Average Annual Expected Price Change (point estimate) - Next one and five years



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 - New instructions have continued at good levels, with the number of sales also progressing at similar levels.

Mr T H Brannen, FRICS, Coast / Newcastle, Brannen & Partners, 0191 2517878, shaun.brannen@brannen-partners.co.uk - Very good listings figures coupled with very good 'sale agreed' figures.

Neil Foster, FRICS, Northumberland, Foster Maddison Property Consultants, 01434 605441 - No sign of the tight market conditions easing. Vendors are coming to market and there are just about sufficient buyers to maintain equilibrium.

Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361, alex.mcneil@bramleys1.co.uk - Increased activity last month in most sectors of the market with more instructions and sales being agreed, however, values remain stable.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - The Wakefield market continues to be busy.

Ian Adams, MRICS, Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - The right property is being snapped up due to shortage of homes for sale.

John Reeves, FRICS, York, Colenso group, 01904682800, john-reeves@helmsley.co.uk - Its slowing a bit, not sure why, but mortgages are very difficult

Kenneth Bird, MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - Realistically priced properties selling, those for sale at over optimistic prices struggling to get viewings.

Mike Darwin, MRICS, Northallerton, M W Darwin & Sons, 01609 773567, www.darwin-homes.co.uk, enquiries@darwin-homes.co.uk - Number of buyers appear to have fallen over the last 6-8 weeks, summer, Brexit and economy forecasts are affecting confidence.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Steady demand but a definite levelling of prices achieved - has been noticeable in recent weeks.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - Residential property sales seem to have settled down to a pretty normal level all round which we trust will carry us through.

Peter Mawer, MRICS, East Yorkshire, Cranswick, 01262 672110 - The run of fine weather seems to have encouraged more sellers on to the market. Buyers are available with homes that require doing up being especially popular.

North West

Derek Coates, MRICS, Liverpool, Venmore, 0151 236 0301, www.venmores.co.uk, d.coates@venmores.co.uk - A busy month with a high level of buyer enquiries. Quality properties are selling within days of listing with multiple offers being received. Upward pressure on values will raise serious affordability issues in the future.

Ian Macklin, FRICS, Altrincham, Ian Macklin & Company, 0161 980 8011, halebarns@ianmacklin.com - Excellent weather has created an increase in the number of viewing appointments but not a great deal of extra positive action.

John Williams, FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 01513439060, www.b-a-o.com, john@b-a-o.com - Another good month for sales with limited stock continuing to drive prices, particularly in popular areas.

Mr John Halman, MRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460344, www.gascoignehalman.co.uk, jane@gascoignehalman.co.uk - Activity levels noticeably lower.

Stephen H Dodgson, BSc FRICS, Wirral, Rainfords Chartered Surveyors, 0800 612 7957, http://charteredurveyorcheshire.co.uk/, steve.dodgson@live.co.uk - The market has continued to strengthen over the last month with survey instructions up on previous months. Healthy demand for bungalows at present, perhaps a sign of our ageing population

East Midlands

Andrew W York, FRICS, Leicester, Moore & York Ltd, 0116 2558666, www.mooreandyork.co.uk, andy_york99@hotmail.com - Top end (over £750000) appears to be stalling. Sales difficult to achieve.

Chris Charlton, FRICS, Nottingham, Savills, 0115 9348020, www.savills.com, ccharlton@savills.com - A much improved market with new applicants registering and a few more new listings but not sufficient to match current demand. Let's hope the revival in fighting over Brexit doesn't dampen the improvement just yet

Christopher Shallice, FRICS FAAV, Lincolnshire, Hix & Son, 01406 422 777 - Sensibly priced property selling reasonably well. Overpriced property hanging around for long periods with no movement.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Good demand for well-priced properties. Level of market appraisals and new instructions increasing.

Mark Newton, FRICS, Grantham, Newton Fallowell, 01476 591900, www.newtonfallowell.co.uk, mark.newton@newtonfallowell.co.uk - June was a good month for our group but the Grantham office was more subdued compared with last year, instructions held up but sales were lower.

Steve Gadsby, BSc FRICS, Derby, Gadsby Nichols, 01332 296396, www.gadsbynichols.co.uk, stevegadsby@gadsbynichols.co.uk - Slight downturn in market activity but sales still being recorded on realistically priced properties. Brexit still causing uncertain market conditions, to a certain extent.

Tim Yeomans, MRICS, Derby/ Nottingham, SDL Surveying, 07795266361, tim.yeomans@sdsurveying.co.uk - Solid price rises in many parts of Nottingham and Derby. Prices rising above expectations in the high-end areas. Prices in other areas rising but more in line with expectations.

Will Ravenhill, MNAEA MARLA, Leicester, Readings, 0116 2227575, www.readingspropertygroup.com, wravenhill@readingspropertygroup.com - We've had a really strong June for sales, but overall indicators show a definite hardening of the market. Auctions still strong if guides are sensible.

West Midlands

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A solid market. Reasonable levels of both sales and new instructions.

J J Dell, MRICS FAAV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - The demand for some properties for which there is a very limited supply is keenly contested.

Surveyor comments - sales

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, jennifer@harrisonpricehomes.co.uk - Market remaining busy with well-priced stock selling quickly

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Shortage of new instructions resulting in reduced levels of enquiry. Seasonal slowdown expected as holiday season approaches.

John Andrews, FRICS FAAV, Stourport, Doolittle & Dalley, 01562 821600 - A noticeably quieter month with less property coming on for sale therefore levels of enquiry are also lower. Conditions likely to be due to time of the year and holiday season approaching.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Volume of new instructions has increased over the last month with many higher priced properties coming for sale. Activity generally good and sales are being arranged.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - An active month with many properties being sold and despite seasonal slowdown, more properties are becoming available.

Mark Wiggin, MRICS, Ludlow, Strutt and Parker, mark.wiggin@struttandparker.com - All about affordability. Pressure on prices, that would come down but are being held up by lack of supply.

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

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Strong FTB demand, reluctance of parties to place properties on the market given local uncertainties over Brexit involving non-UK based manufacturers. Many parties having appraisals and staying put.

Rosemary Cheadle, AssocRICS, RICS Registered Valuer, Wolverhampton, Worthington Estates, enquiries@worthingtonestates.co.uk - Weather has picked up, market appraisals are up, instructions are up, new buyer enquiries are up and sales figures are steady.

Ryan Williams, FRICS, Hay-on-Wye, McCartneys, 01497 820 778, www.mccartneys.co.uk, ryan@mccartneys.co.uk - Lower end of the market remains reasonable but top end is quieter due to stamp duty changes and economic uncertainty.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - In a number of cases where new properties come onto the market, there are numerous viewings taking place but a smaller proportion are coming to offers. It is considered that seller's expectations in large part of the area we cover are too high.

East Anglia

Chris Philpot, FRICS, Stowmarket, Suffolk, Lacy Scott and Knight, www.lsk.co.uk, cphilpot@lsk.co.uk - A patchy market, but with some good instructions becoming available.

David H Knights, MRICS, Ipswich, David Brown & Co, 01473 222266, www.davidbrown-ipswich.co.uk, mail@davidbrown-ipswich.co.uk - Market is slowing down across all sectors. More properties coming on but less demand resulting in price reduction. General uncertainty due to Brexit, threat of increased interest rates & high stamp duty.

Ed Russell, Suffolk, Jackson-Stops & Staff, 01638 662231 - Summer has come early.

Jan Hytch, FRICS, Norwich, Arnolds, 1306320551 - A change from sellers to a buyers' market.

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

Mark Wood, MRICS, Cambridge, Carter Jonas, 01223 403330, mark.wood@carterjonas.co.uk - Increase in new instructions has generated increased viewings and sales agreed. Ratio of viewings to offers has improved markedly over the last 4 weeks or so.

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - A reasonable number of new instructions with buyers for sensibly priced properties. A strong market at the lower end fuelled by shortage of supply. At the middle and upper end buyers wanting to find homes now before the holiday season.

Rob Swiney, MRICS, Bury St Edmunds, Lacy Scott and Knight, 01284 748636, www.lsk.co.uk, rswiney@lsk.co.uk - There are some signs of activity but property prices are still too high with evidence of price reductions showing on a daily basis.

Tom Goodley, MRICS, Norfolk, Strutt & Parker, 01603 617431, struttandparker.com, tom.goodley@struttandparker.com - Market conditions remain buoyant with high levels of interest from outside the region.

W J Hartnell, FRICS, Essex, Simon Matthew & Co, 01277 355255 - House prices have fallen over the 2 years. New buyers are beginning to return.

South East

Anthony Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Sluggish sales market- most vendors realistic about prices others reluctant to face reality. Brexit turmoil and uncertainty combined with excessive stamp duty has damaged the property market - though easily reversed

Christopher Sims, FRICS, Kent, Michael Rogers, christopher.sims@michaelrogers.co.uk - The residential investment market continues to enlarge.

David Boyden, MRICS, Colchester, Boydens, 01206 762244, www.boyden.co.uk, david.boyden@boydens.co.uk - Not a bad start to financial year but we are behind last two years. More stock rushing to market by vendors who feel need to sell before Brexit scuppers their plans and the market falls away.

David Nesbit, FRICS, Portsmouth, D.M.NESBIT & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - A marginal increase in instructions but interest remains very selective. Hot weather limiting viewings.

David Parish, FRICS, Essex, Gates Parish & Co, 01708 250033 - The number of available properties is increasing. We are finding that special properties are attracting high levels of interest and are selling. However, normal estate type properties are more difficult to sell.

Donald Leslie, MRICS, Amersham, Donald Leslie & Co. Ltd., 01494 722006, www.donaldleslie.co.uk, donald@donaldleslie.co.uk - Significant increase in the amount of property on the market here but very few buyers.

Edward Rook, MRICS, Sevenoaks, Knight Frank, edward.rook@knightfrank.com - Vendors slow to react to a price sensitive market

Edward Seymour, MRICS, Lewes, Strutt & Parker, 01273 407014 - In this turbulent market, there still seems to be a wide gap with what vendors are trying to achieve and what buyers will actually pay. Incredibly price sensitive!

Ian Perry, FRICS, Faringdon Highworth Lechlade Fairford Witney, Perry Bishop and Chambers, 01285655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - Strong sales through May and June.

Surveyor comments - sales

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Marked increase in buyer activity and deals agreed month to month.

John Frost, MRICS, Beaconsfield, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - The market is becoming increasingly price driven. The market is over inflated and clients are finding it difficult to adjust to the low offers which are being made.

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Cost of moving still remains an issue (Stamp Duty). Slower overall market means less buyers in proceedable position. Stock levels rising due to slow sales rate and over pricing.

Mark Everett, FRICS, Epsom, Michael Everett & Company, markeverett@michael-everett.co.uk - Activity levels have dropped over the past few weeks. Sellers remain over-optimistic and buyers highly selective, hence sales are difficult to agree. More realism required.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - This month has seen a clear swing away from the sales market towards the rental sector. Sales activity is at the lowest level we have ever recorded.

Michael Brooker, FRICS, Crowborough, MICHAEL BROOKER, 01892663377, michael@michaelbrooker.co.uk - Tough! Too many distractions -weather/football/Brexit.

Paul Christian Bird, MRICS, Braintree Essex, Joscelyne Chase, 01376 554518, www.joscelynechase.co.uk, paul@joscelynechase.co.uk - We seem to be in a subdued period - slow progress on all sales. Limited demand for new homes.

Philip Hiatt, MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, www.your-move.co.uk/eastgrinstead, philip.hiatt@your-move.co.uk - Distinct slowing in market activity in June. Weather, World Cup, Brexit, Interest Rates all could play a part.

Stephen Wolfenden, FRICS, Oxford, The County Homeseach Company Oxfordshire Ltd, www.county-homeseach.com, oxfordshire@county-homeseach.com - Stamp duty biggest issue although negative sentiment around Brexit is equally negative.

Tim Green, MRICS, South Oxfordshire, Green & Co, 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - Brexit, the weather, the World Cup, Wimbledon - whatever is taking the attention of the property market is now about to have the holiday season added to it. Moves of necessity continue but still few of desire.

Tony Jamieson, MRICS, Guildford, Clarke Gammon Wellers, 01483 880900, www.clarkegammon.co.uk, jamieson@clarkegammon.co.uk - Increased stock has led to a "buyers' market" with only correctly price stock selling. Oversupply of town centre flats has led to big price reductions, particularly in new build stock in order to effect sales.

South West

David Lewis, BSc hons, West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk - Weak market conditions caused by political and economic uncertainty are leading to price deflation Lack of supply is returning which may underpin the market.

David McKillop, FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk - A good start to the month, but the last two weeks have been very quiet. Instructions still okay, but viewings and sales much slower.

David Robinson, AssocRICS, Launceston, Stags, 01566 774999, d.robinson@stags.co.uk - Buyer activity improving but lack of proceedable buyers hampering sales income, Political uncertainty and Brexit worries continue.

G C Thorne, FRICS, East Dorset, Thornes, 01202-684004, www.thorne.org.uk, graham@thornes.org.uk - The market remains difficult with fewer listings and sales taking longer to complete

Ian Perry, FRICS, Cheltenham Cirencester Nailsworth Stroud Tetbury, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - Sales increased markedly in June.

James McKillop, MRICS, South West region, Knight Frank, 0207 861 1528, mckillop@knightfrank.com - The prime market continues to be exceptionally price sensitive with too many over-priced houses across the region. That said, we are agreeing some excellent deals with accurately priced houses.

James Wilson, MRICS, Dorset, Jackson-Stops & Staff, 01747 850858 - New instructions have increased as have numbers and deals agreed.

Jeff Cole, MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - June has certainly been busier than May in terms of sales & viewing activity is certainly better. Correct pricing is however crucial to achieve a sale

Jeremy Priestley, FRICS, Poole, Berkeleys, 01202708383, www.berkeleys.com, jeremy.priestley@yogroup.co.uk - Despite (or maybe because of) the improved weather, the market has failed to take off, especially at the upper end (£1.2m+). The uncertainties appear to be increasing - SDLT, Brexit, interest rate concerns; government inertia.

John Corben, FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - The market remains subdued with a scarcity of genuine purchasers and concerns over the national economy. The position is likely to remain the same until conditions and stability return.

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - A steady market with supply and demand underpinning the market, sales prices holding up well.

Miles, MRICS, Totnes, Chartsedge, 01803 505115, www.chartsedge.co.uk, miles@chartsedge.co.uk - A marked increase in the number of people not putting their properties on the market until they have found somewhere to move to.

Oliver Miles, FRICS, Swanage, Oliver Miles, 01929 426655, www.olivermiles.co.uk, olivermiles@olivermiles.co.uk - Fragile market continues but appraisals and new instructions have increased to a healthier level.

Robert Cooney, FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230 230, robertcooney.co.uk, robertcooney@robertcooney.co.uk - Market appraisal and instruction levels at a two-year high and good sales volumes across the price spectrum with some surprisingly high sale prices in good locations.

Roger Punch, FRICS, South Devon, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - A positive month for sales, but stock levels remain low, generating a concern for the second half of the year.

Simon Barker, MRICS, Sherborne, Knight Frank LLP, simon.barker@knightfrank.com - I think the market is very fickle with buyer sentiment waning. We have had 6 fall throughs over the past 2 weeks which is very bad news.

Surveyor comments - sales

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - June was the first month this year that I feel the market has cooled (unlike the weather!) Lots more stock to sell which is giving buyers more choice but there are less buyers about, particularly those who are in a position to proceed.

Stephen Morris, MRICS, Bristol & Bath, Davies & Way, 01225 400400, daviesandway.com, stephenmorris@daviesandway.com - June has been a slower month in sales compared to a busy May. Is it Brexit, the hot weather, the World cup or a combination of all 3?

Wales

Andrew Morgan, FRICS FAAV, Lampeter, Morgan & Davies, 01570423623, morgananddavies.co.uk, lampeter@morgananddavies.co.uk - Seasonally busy, underlying positive trends. Over regulation becoming unbearable for speculative purchasers. Virtually no buy to let investment.

Anthony Filice, FRICS, Cardiff, Kelvin Francis, 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Decline in enquiries & viewings, middle to upper price ranges, affected by new Land Transaction Tax. First time buyers prevalent, in viewing and offering. Shortage of 2 bed starter and 3 bed semis, so asking prices, or near, being paid.

David Evans, FRICS, Rhayader, Clare Evans & Co, 01597 810457, www.clareevansandco.co.uk, clare.evans@clareevansandco.co.uk - Recent sales have been very quick and a good number have been in excess of the asking price.

David James, FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - Sales are up on last year, keep expecting the market to slow down but not so far.

Paul Lucas, FRICS, Haverfordwest, RKLucas & Son, 01437 762538, www.rklucas.co.uk, paul@rklucas.co.uk - Market activity remains reasonably strong.

London

Alun Jones, MRICS, Knightsbridge, Marler & Marler, 020 7235 9641 - Whilst we have seen increased activity in the last 3 months, tax, buying costs, and Brexit uncertainty remain big factors.

B K Bhalla, MRICS, HI, CEA, Hounslow, Acrewoods, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - Highly priced properties across the board are holding back the market. Agents need to do more to help the market which is seeing very little activity.

Christopher Ames, MRICS, London/Belgravia, Ames Belgravia Ltd, 020 7730 1155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - There are still many owner occupiers wishing to up-size or down-size over the next few months. If buying/selling simultaneously they will often lower prices so that they achieve the desired timing of their logistical move.

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - Buyer uncertainty continues. Downward price adjustment having little or no effect,

James Perris, MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Spring has seen a slight increase in activity and demand, particularly where applicants have reduced asking prices to reflect this much more price sensitive market.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Better sales agreed and exchanges are the outcome of protracted negotiations. Transactions are taking longer especially as more viewings are required to generate commitment. More listings but not sufficient to make a difference!

John J King, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Good month for exchanges, instruction levels improving, applicant levels have dipped. Applicants inspecting a greater number of properties.

John J King, FRICS, Merton LB, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Noticeable slow down, location sensitive. Applicant levels have fallen but we are seeing a higher number of viewings, about 8 inspections to each offer.

Robert Green, MRICS, Chelsea, John D Wood & Co, 020 7352 1484 - June has been a great month, with strong exchanges and new sales agreed. Domestic market is recovering liquidity. Overseas buyers more active, although most still waiting for a Brexit deal.

Ronan McNamara, AssocRICS, Ealing, London, Robertson Smith and Kempson, 0208 5662340, robertsonsmithandkempson.co.uk, ronan@robertsonsmithandkempson.co.uk - We are benefiting from being close to future Crossrail stations in our area. The recent changes to tax legislation has killed the Buy to Let market. In my view this has gone too far.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - The market in central and prime London remains weak, but there are significant local differences. We have seen a number of sales at the very high end.

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

William Delaney, AssocRICS, City of London, Lawrence Ward & Co, 02073379600, www.lawrenceward.co.uk, w.delaney@lawrenceward.co.uk - Concern over the political and economic uncertainty continues to affect confidence. Low transaction levels mean it is difficult to ascertain price movements with any accuracy.

Scotland

Adrian Stott, FRICS, Lothians and north Northumberland, J and E Shepherd, 01316533456, shepherd.co.uk, a.stott@shepherd.co.uk - Still lack of supply with prices achieved in excess of home report values.

Alex Inglis, MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com - The market remains steady. Small reduction in viewings but viewers are generally serious and we have seen an increase in sales along with a reduction in average selling time.

Andrew Hitchen, MRICS, Stirling, Shepherd Surveyors, andrew.hitchen@shepherd.co.uk - Market remains constrained by lack of new vendor instructions and with school holidays looming large it is hard to foresee a short term improvement.

Ben Fox, MRICS, Edinburgh, Savills, bfox@savills.com - The supply in Edinburgh continues to fall short of demand with positive activity across the city and price ranges.

Craig Henderson, MRICS, South and East Ayrshire, Graham & Sibbald, 01292 271030, www.g-s.co.uk, craig.henderson@g-s.co.uk - The market in most areas continues to show improvements, with demand outstripping supply, which is helping generate strong prices. This is likely to continue for the foreseeable future!

Surveyor comments - sales

Graeme Gilchrist, MRICS, Dundee, Graham + Sibbald, 01382 200064, www.g-s.co.uk, graeme.gilchrist@g-s.co.uk - Early year trends continue as the number of properties coming to the market remains low and properties are frequently selling in excess of their Home Report value. Supply not meeting current demand.

Graeme Lusk, BSc MRICS, Glasgow and Renfrewshire, Walker Fraser Steele, 01412480038, www.walkerfrasersteele.co.uk, graeme.lusk@walkerfrasersteele.co.uk - Limited supply coming to the market continues to benefit vendors in popular locations, with many properties selling over home report value. Even over the summer, it's still a great time to put your property on the market.

Graham Tonner, MRICS, Tayside, Graham + Sibbald, 01382200064, www.g-s.co.uk, gtonner@g-s.co.uk - Uncertainty remains and in a traditionally busy period there is still no real flow to the market. Lack of stock coming to the market means sale prices are generally good.

Grant Robertson, MRICS, Glasgow, Allied Surveyors, 0141 330 9950 - There are signs of the West End market resisting any further price increases in some areas and property types.

Ian J Fergusson BS, FRICS, Stirling, J&E Shepherd17, 01786450438, www.shepherd.co.uk, ian.fergusson@shepherd.co.uk - A strong month for Home reports in June and prices moving up. Low stock levels benefits the seller and encourages buyers to outbid competition.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - The summer holidays have arrived and the market is still slower than last year at this time. Sellers are still cautious regarding placing their property on the market.

John Brown , FRICS, Edinburgh, John Brown and Company , 07768583919, john.brown@jb-uk.com - Edinburgh market is leading the way in the property market. Interest in the city is strong from buyers outside the region whom seem not discouraged by the LBTT tax. Locals find the level very hard to justify. Supply is curtailed. Prices up.

Kevin Hay, BSc MRICS, Ayrshire, Allied Surveyors, 01292 265381 - Demand for property is still good and a number of sales are achieving prices in excess of Home Report values.

Kevin MacDonald, MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, kmacdonald@g-s.co.uk - June remained active across most market sectors showing a relatively strong lead up to the summer holiday period. Realistic expectations, valuations and pricing are still the key to successful deals with strong prices continuing to be paid.

Kyle Porter, MRICS, Dundee & Angus, Graham + Sibbald Chartered Surveyors, 01382 200064, www.g-s.co.uk, kyle.porter@g-s.co.uk - The Angus market remains relatively static, reasonably price bungalows and family homes tend to sell well due to lack of available stock.

Marion Currie, AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com - Summer market continues with encouraging numbers of deals agreed. Steady numbers of new instructions.

Martin Douglas, MRICS, Paisley, Graham + Sibbald, 01418893251, www.g-s.co.uk, martin.douglas@g-s.co.uk - The lack of property being brought to the market, restricted supply and increased demand has resulted in properties selling after a shorter marketing period and often above Home Report.

Thomas Baird, MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, www.selectsurveyors.co.uk, reception@selectsurveyors.co.uk - Whilst we have seen an uptake in recent Home Report instructions, the level of stock available for sale is still relatively low for this time of year.

Tom Murray, AssocRICS. RICS Registered Valuer, Girvan, Galloway & Ayrshire Properties, 01465 713498, www.gapinthemarket.com, Tom. murray@gapinthemarket.com - The good weather through June has brought about an increase in buyer and seller engagement. Busy across valuations, instructors and sales.

Northern Ireland

Daniel Mc Leron, FRICS, Omagh, Co. Tyrone, Mc Leron Estate Agents, 02882 242772, www.mclernonestateagents.com, info@mclernonestateagents.com - Market has remained resilient, in spite of normal seasonal change.

Eoin Lawless, FRICS, Warrenpoint, Eoin Lawless Estate Agents, info@lawlessestateagent.co.uk - Summer holidays approaching and the seasonably good weather has increased enquiries and market activity. Rental market has gone a little static.

Kirby O'Connor, Assoc Rics, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - Market has seen strong desire for new build with refurbished homes also firm.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - The new homes market is performing well with strong levels of activity - as we approach summer holiday, resale activity should fall back but still remain strong

Surveyor comments - lettings

North

Mr T H Brannen, FRICS, Coast / Newcastle, Brannen & Partners, 0191 2517878, shaun.brannen@brannen-partners.co.uk - Strong demand, though the supply is dwindling due to many landlords leaving the lettings market [for good in some cases].

Neil Foster, FRICS, Northumberland, Foster Maddison Property Consultants, 01434 605441 - Desperate shortage of larger family sized homes to let, placing persistent pressure on rent expectations.

Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361, alex.mcneil@bramleys1.co.uk - Continued strong tenant demand, particularly for 3-bedroom houses and larger properties as an increasing proportion are prepared to rent for longer term.

Christopher Evans, FRICS, Hull, Haller Evans, 01482 323033 - We are receiving high demand for good quality properties and re-lettings are quickly achieved.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - Lettings are still very busy.

Ian Adams, MRICS, Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - Seems that supply and demand is in balance, the better areas may see some marginal rent increases.

John Reeves, FRICS, York, Colenso group, 01904682800, john-reeves@helmsley.co.uk - Red hot

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Continued steady demand for good quality properties at realistic asking rentals.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - Summer and early autumn, i.e. July to early October lettings are quite good, but with a noticeable shortage of new letting instructions.

Peter Mawer, MRICS, East Yorkshire, Cranswick, 01262 672110 - As always in this area, demand exceeds supply and good quality property is particularly sought after.

Simon Croft, Harrogate, FSS, 01423 534186, www.fssproperty.co.uk, simon.croft@fssproperty.co.uk - Brexit is having an effect. Lack of Europeans renting 1 bed's, causing a drop in rents. Landlords are selling due to lower returns and tax, flooding the market where there is no demand and pulling prices down on 1 bed stock.

North West

Mr John Halman, MRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460344, www.gascoignealman.co.uk, jane@gascoignealman.co.uk - The market has changed and tenant fee ban continues to present numerous challenges in the market.

Richard Towler, BSc MRICS, Penrith, Eden Lettings & Management, 01768 899421 - Perceived increase in landlords selling up, so more competition for limited supply. Increases in regulation and tax changes partly to blame.

East Midlands

Andrew W York, FRICS, Leicester, Moore & York Ltd, 0116 2558666, www.mooreandyork.co.uk, andy_york99@hotmail.com - Demand and supply appear to be in equilibrium at the moment.

Christopher Shallice, FRICS, FAVV, Lincolnshire, Hix & Son, 01406 422 777 - Good demand generally. Variable quality applicants.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Tenant demand still good. Buoyant market for well presented properties

John Chappell, MRICS, Skegness, Property Office, 01754 763520 - Upturn in business in general due to improved weather which has brought an upturn in tenant demand, albeit seasonal.

Will Ravenhill, MNAEA MARLA, Leicester, Readings, 0116 2227575, www.readingspropertygroup.com, wravenhill@readingspropertygroup.com - What to say? Landlords are selling, tenants are trying to negotiate rents and the amount of red tape we have to contend with for no extra fees is increasing. Thank you Her Majesty's Government!!

West Midlands

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - The market remains very stable although the supply of new instructions in the coming months is a concern.

Dean Taylor, MRICS, Harborne/ Birmingham, JPTaylor, 0121 428 4333, www.jptaylor.co.uk, dean@jptaylor.co.uk - Tenant enquiries are improving but again we have limited stock to offer. We expect this to continue as we enter July.

J J Dell, MRICS FAVV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Very limited supply as tenants stay put.

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, jennifer@harrisonpricehomes.co.uk - Tenant demand steady for the time of the year.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Constant and steady demand for all types of property. As always, more new instructions needed.

John Andrews, FRICS FAVV, Stourport, Doolittle & Dalley, 01562 821600 - A steady and constant market for most types of rented property that comes available in the area. Generally, properties are letting well although more family homes are needed.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Like previous months, an active market with more property needed to satisfy demand. Rents rising gently.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - Properties are generally letting well with rents increasing. Increased volume of flats available with more soon to be listed.

Mike Arthan, FRICS, Shropshire, Barbers, m.athan@barbers-online.co.uk - Still a balanced local lettings market place.

Nicholas Lamb, MRICS, Birmingham, Naismiths Limited, 0121 2623450, www.naismiths.com, nicholas.lamb@naismiths.com - Evidence that more families are renting because of choice rather than necessity pushing up demand for high quality properly managed stock

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Well balanced market with good supply and demand. Good quality stock attracting premium.

Ryan Williams, FRICS, Hay-on-Wye, McCartneys, 01497 820 778, www.mccartneys.co.uk, ryan@mccartneys.co.uk - Steady as we go. Much less buy to let activity due to increased taxation and likelihood of static resale values for a while.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - Market activity remains steady.

Surveyor comments - lettings

East Anglia

Chris philpot, FRICS, Stowmarket, Suffolk, Lacy Scott and Knight, www.lsk.co.uk, cphilpot@lsk.co.uk - Tenants still enter and leave the market regularly, and there is good demand.

Jan Hytch, FRICS, Norwich, Arnolds, 1306320551 - Particularly buoyant market certainly a supply issue whilst demand is still present

Jeffrey Hazel, FRICS, Norfolk, Geoffrey Collins & Co., 01553 774135 - Strong demand. Limited Supply.

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

W J Hartnell, FRICS, Essex, Simon Matthew & Co, 01277 355255 - Lettings have been buoyant over the last 2 years and we expect them to continue.

South East

David Boyden, MRICS, Colchester, Boydens, 01206 762244, www.boyden.co.uk, david.boyden@boydens.co.uk - June started well but fell away with hot weather/hols/football. July looks promising. Government interference creating uncertainty & negativity in industry/landlords with tax/legislation/MEES/tenant fee ban/3-year tenancies etc.

David Parish, FRICS, Essex, Gates Parish & Co, 01708 250033 - The demand is fairly steady but rents have reached the maximum level of affordability.

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Lack of new buy to let investment and existing buy to let investors selling is reducing available rental stock and having an upward influence on rental values.

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Limited new stock. Reduction in Buy to Let investors.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - A much more buoyant month with lettings being achieved quickly at or near guide rents.

Michael Brooker, FRICS, Crowborough, Michael Brooker, 01892663377, michael@microelgars.co.uk - Lack of stock. Letting well and rapidly.

Stephen Wolfenden, FRICS, Oxford, The County Homeseach Company Oxfordshire Ltd, www.county-homeseach.com, oxfordshire@county-homeseach.com - Increasing departures from EU tenants

Stuart Gray, MRICS FAVV, St Albans, Strutt & Parker, 01727 738280, www.struttandparker.com, stuart.gray@struttandparker.com - Larger homes continue to be slower to let, but smaller properties attracting good levels of competitive interest

Tom White, MRICS, Saffron Walden, The Audley End Estate, tom.white@audleyendestate.co.uk - Good quality property is attracting good calibre tenants and agreements are swift.

Tony Jamieson, MRICS, Guildford, Clarke Gammon Wellers, 01483 880900, www.clarkegammon.co.uk, jamieson@clarkegammon.co.uk - Lack of tenant demand and increased landlord instructions has led to a general reduction in rents achieved

South West

John Corben, FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - The proposed legislation to provide tenants with a minimum of a 3-year agreement will lead to a shortage.

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - No change. Lettings continue as before although rents are static.

Paul Oughton, MARLA, MNAEA, Cirencester and the Cotswolds, Moore Allen & Innocent LLP, 01285 648 100, www.mooreallen.co.uk, paul.oughton@mooreallen.co.uk - Good levels of supply and demand but existing and new landlords being put off by new legislation.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - Tenant demand remains strong for more modest properties and rents are still going up. A few landlords are selling, particularly poorer quality housing stock. Exeter city market particularly buoyant.

Wales

Anthony Filice, FRICS, Cardiff, Kelvin Francis, 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Busy in numbers of lets, there is a shortage of stock to replace them.

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

Paul Lucas, FRICS, Haverfordwest, RKLucas & Son, 01437 762538, www.rklucas.co.uk, paul@rklucas.co.uk - Lettings are increasing in activity.

London

Alun Jones, MRICS, Knightsbridge, Marler & Marler, 020 7235 9641 - Fewer new lettings but there are more tenants.

B K Bhalla, MRICS, HI, CEA, Hounslow, Acrewoods, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - Landlords very concerned about the quality of tenants and signing tenants up beyond 6 months at a time.

Benjamin Mire, Colindale, London, Trust Property Management, 02083586543, www.trustplc.com, bmire@trustplc.com - The market continues to be buoyant with tenant demand up matched by an increase in landlords instructions

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 8000, www.dauntons.co.uk, mail@dauntons.co.uk - Levels of available property reducing, some landlords deciding to sell up rather than re-let.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - PRS activity is starting to mirror what's happening in the sales sector rather than the opposite as is often the case. In other words, lower demand and more listings is creating too much choice, lower rents and a tenants' market

John J King, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jjking@as-r.co.uk - Positive month all round with higher number of long term lets agreed. Mainly due to more affordable rent levels being advertised.

John J King, FRICS, Merton LB, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jjking@as-r.co.uk - Better month, landlords taking stock of market conditions and responding positively.

Ronan McNamara, AssocRICS, Ealing, London, Robertson Smith and Kempson, 0208 5662340, robertsonsmithandkempson.co.uk, ronan@robertsonsmithandkempson.co.uk - The Brexit effect has definitely affected the quality of corporate tenants in West London.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - The rate of annual rent falls is slowing, the largest falls continue to be seen in central London. Accidental landlords are increasing supply in some areas.

Surveyor comments - lettings

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

Will Barnes Yallowley, Assoc RICS, Kensington London, LHH Residential, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - Sufficient demand for good rental property at the right price.

William Delaney, AssocRICS, City of London, Lawrence Ward & Co, 02073379600, www.lawrenceward.co.uk, w.delaney@lawrenceward.co.uk - Lettings in the City of London are heavily dependent upon companies transferring staff into London. Economic uncertainty caused by protracted Brexit negotiations is causing them to put relocation plans on hold. As a result, rents are soft.

Scotland

Grant Robertson, MRICS, Glasgow, Allied Surveyors, 0141 330 9950 - Continuing leakage from rental to sales is driving down stock levels and maintaining rental levels especially for family homes.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - Tenant demand for properties is still high and we see this continuing, creating a shortage of good stock.

John Brown, FRICS, Edinburgh, John Brown and Company, 07768583919, john.brown@jb-uk.com - Landlords continue to be concerned by threat of more rules and regulations. Airbnb in city lettings market is increasing as standard rentals are likely to be restricted by controls in rental levels.

John Gell, MRICS, Inverness, Simply Let, 01463 718888, www.simplylet.biz, john.gell@simplylet.biz - A busy month with professional tenants moving into Inverness, particularly NHS recruits at Raigmore Hospital. New instructions up. Investors appear relaxed about recent tax and regulatory changes. Well-presented properties securing tenants quickly.

Neil J Woodhead, FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co - Enquiries increased significantly following a quiet April and May.

Rachel Bromby, MRICS, Nairn, Cawdor Estate, rachel@cawdor.com - Private Residential Tenancies taking properties out of the market and increasing rents.

Richard S Burnett, FRICS, Aberdeen, PMC Management and Letting, 01651 871086, www.pmcproperty.com, r.burnett@pmcproperty.com - The involvement of FTT in lettings is going to have a significant impact on workloads with little or no return.

Northern Ireland

Heather Rountree, AssocRICS, Belfast, Macfarlane & Smyth, 02890 325888, heather.rountree@macfarlanesmyth.com - There are certainly calendar effects. Student property being sought during the earlier part of the year. Seasonal holidays also having an effect, demand down.

Kirby O'Connor, Assoc Rics, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - Rentals very strong, the higher end has slowed slightly though.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - Rental values will remain strong as we head into holiday season

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