



November 2018: UK Residential Market Survey

Market activity slips further

- Indicators on demand and sales weaken again
- Sales expectations for the next three months cast a downbeat outlook for the market
- Prices still seen rising across much of the UK in the coming year

The November 2018 RICS UK Residential Market Survey results are consistent with a weaker trend in sales market activity with headline indicators on both demand and supply edging further into negative territory. Furthermore, forward looking metrics suggest that momentum is likely to continue slipping in the coming three months, although a somewhat stable trend is expected to emerge further out.

Starting off with the demand indicator, the New Buyer Enquiries gauge fell to -21% in the latest results from -15% previously, representative of a more cautious approach from property purchasers. The latest numbers continue to imply that the limited choice for properties for sale is likely to be one factor hampering buyer demand. The new instructions series pointed to a decline in the supply of properties coming on to the market for the fifth consecutive report. Significantly, the net balance of -24% in November was the fastest pace of decline in new sales listings noted in twenty-eight months. As a result, average stock levels on estate agents' books remained close to record lows at 42.1. At the same time, contributors continue to report that new appraisals by property valuers are down in comparison to a year earlier suggesting that any pick-up in new sales listings is not on the horizon.

Meanwhile, the time taken to complete a sale from initial listing stands at approximately 19 weeks. As such, this represents the longest duration since the series was first introduced in February 2017 and is another sign of challenges in the sales market.

Against this backdrop, the Newly Agreed Sales net balance moved to -15% from -10% in the previous report pointing to a modest decline in sales transactions at the national level. When disaggregated, activity was reportedly subdued in almost all areas of the UK. Anecdotal evidence continues to suggest that Brexit uncertainty and lack of fresh stock are the principle factors behind the subdued trend in market activity.

Moreover, there is little sense that these headwinds will fade anytime soon. Headline sales expectations fell to -23% in November (from -6% previously), indicating that momentum looks likely to slip further over the coming three months. That said, contributors are expecting sales volumes to stabilise in the coming year with positive sales trends envisaged across Northern Ireland, South West and East Anglia in particular.

Turning to prices, the headline price net balance came in at -11% in November, broadly unchanged from -10% in October. Overall, this indicator is consistent with a modest fall in national house prices. Still, the regional picture remains highly varied, with negative price trends across London, South East and East Anglia contrasting with solid price growth reported in Northern Ireland, Scotland, the Midlands and the North West.

Looking ahead, price expectations for the coming three months dipped to -25% (from -17% in October) consistent with a fall in national house price inflation on a UK wide basis. The twelve-month outlook however is broadly flat.

In the lettings market, the latest numbers (which form part of a non-seasonally adjusted series) are indicative of demand from prospective tenants holding broadly steady for the second month running. Alongside this, the new landlord instructions series remained entrenched in negative territory (net balance of -14%) signalling a decline in the supply of fresh rental stock coming on to the market. As a result of these dynamics, rents are expected to rise modestly over both the three and twelve month horizons.

Further out, rental growth is expected to outpace that of prices; on average, rents are expected to rise by 3.1% per annum over the next five years, whilst price growth projections stand at 2.3% on the same basis.

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

Methodology

About:

- The RICS Residential Market Survey is a monthly sentiment survey of Chartered Surveyors who operate in the residential sales and lettings markets.

Regions:

- The 'headline' national readings cover England and Wales.
- Specifically the 10 regions that make up the national readings are:
 - 1) North 2) Yorkshire and Humberside 3) North West 4) East Midlands 5) West Midlands 6) East Anglia 7) South East 8) South West 9) Wales 10) London.
- The national data is regionally weighted.
- Data for Scotland and Northern Ireland is also collected, but does not feed into the 'headline' readings.

Questions asked:

- How have average prices changed over the last 3 months? (down/ same/ up)
 - How have new buyer enquiries changed over the last month? (down/ same/ up)
 - How have new vendor instructions changed over the last month? (down/ same/ up)
 - How have agreed sales changed over the last month? (down/ same/ up)
 - How do you expect prices to change over the next 3 months? (down/ same/ up)
 - How do you expect prices to change over the next 12 months? (% band, range options)
 - How do you expect prices to change over the next 5 years? (% band, range options)
 - How do you expect sales to change over the next 3 months? (down/ same/ up)
 - How do you expect sales to change over the next 12 months? (down/ same/ up)
 - Total sales over last 3 months i.e. post contract exchange (level)?
 - Total number of unsold houses on books (level)?
 - Total number of sales branches questions 1 & 2 relate to (level)?
 - How long does the average sales take from listing to completion (weeks)?
 - How has tenant demand changed over the last 3 months? (down/ same/ up)
 - How have landlords instructions changed over the last 3 months? (down/ same/ up)
 - How do you expect rents to change over the next 3 months? (down/ same/ up)
 - How do you expect average rents, in your area, to change over the next 12 months? (% band, range options)
 - What do you expect the average annual growth rate in rents will be over the next 5 years in your area? (% band, range options)
 - What is your sense of current price levels being achieved in your area (Very Expensive, Expensive, Fair value, Cheap, Very Cheap)
- Questions 6, 7, 17 and 18 are broken down by bedroom number viz. 1-bed, 2-bed, 3-bed, 4-bed or more. Headline readings weighted according to CLG English Housing Survey.

Net balance data:

- Net balance = Proportion of respondents reporting a rise in prices minus those reporting a fall (if 30% reported a rise and 5% reported a fall, the net balance will be 25%).**

- The net balance measures breadth (how widespread e.g. price falls or rises are on balance), rather than depth (the magnitude of e.g. price falls or rises).
- Net balance data is opinion based; it does not quantify actual changes in an underlying variable.
- Net balance data can range from -100 to +100.
- A positive net balance implies that more respondents are seeing increases than decreases (in the underlying variable), a negative net balance implies that more respondents are seeing decreases than increases and a zero net balance implies an equal number of respondents are seeing increases and decreases.
- Therefore, a -100 reading implies that no respondents are seeing increases (or no change), and a +100 reading implies that no respondents are seeing decreases (or no change).
- In the case of the RICS price balance, a reading of +10 should not be interpreted as RICS saying that house prices are going up by 10%, but that 10% more surveyors reported increases rather than decreases in prices (over the last three months).
- A change from +30 to +60 does not mean that the variable grew by 30% in one period and by 60% in the next period, but it does indicate that twice as many surveyors reported an increase compared to a decrease than in the previous period.
- Likewise, if we get a reading dropping from +90 to +5, this still means that more respondents are reporting increases than decreases overall, but the breadth of those reporting increases has fallen dramatically; meanwhile, a shift in the reading from -90 to -5 still means that more respondents are reporting decreases than increases overall, but the breadth of those reporting decreases has fallen dramatically.

Seasonal adjustments:

- The RICS Residential Market Survey data is seasonally adjusted using X-12.

Next embargo dates:

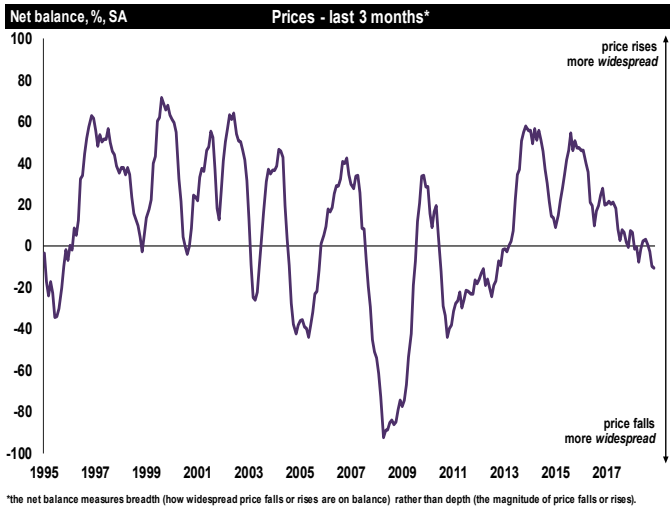
- December Survey: 17 January**
- January Survey: 14 February**
- February Survey: 14 March**

Number of responses to this month's survey:

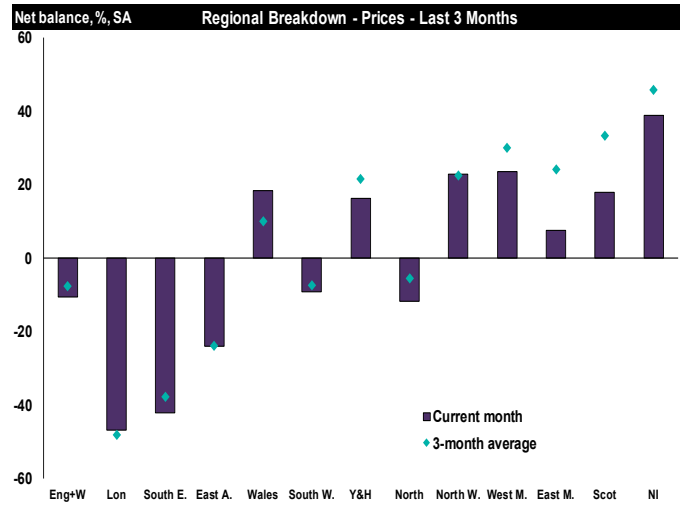
- This survey sample covers 579 branches coming from 306 responses

Sales market charts

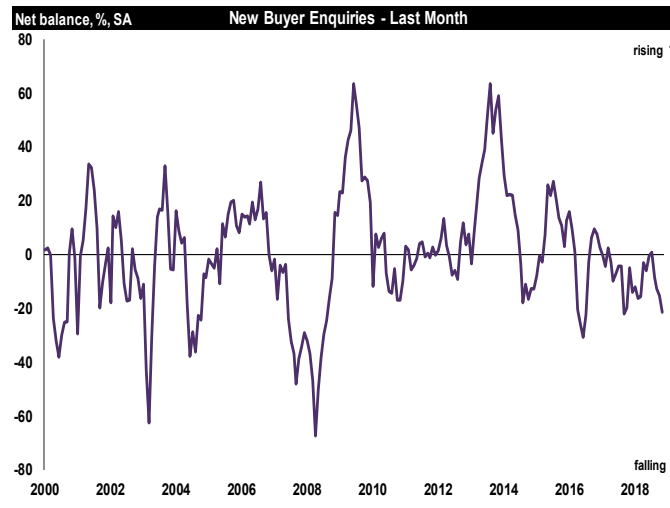
National Prices - Past three months



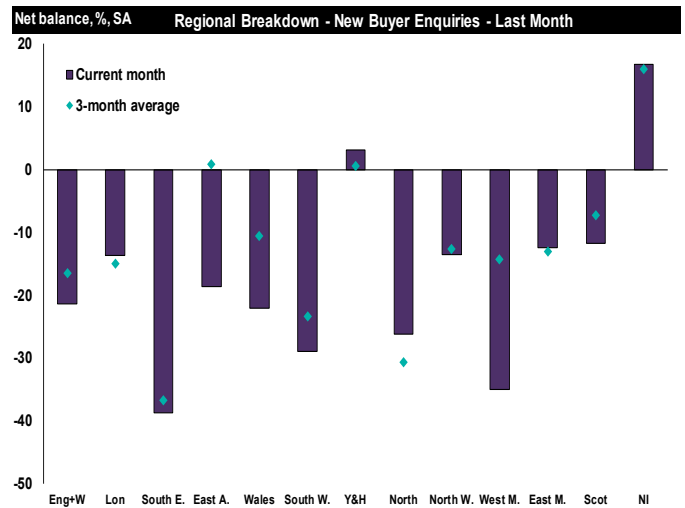
Regional Prices - Past three months



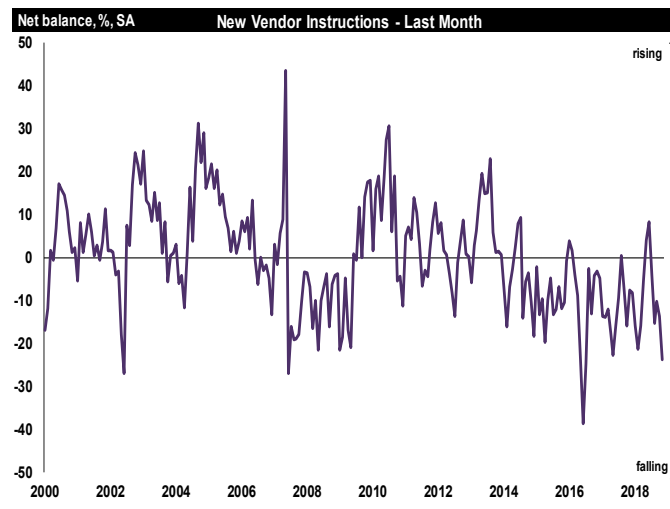
National Enquiries - Past month



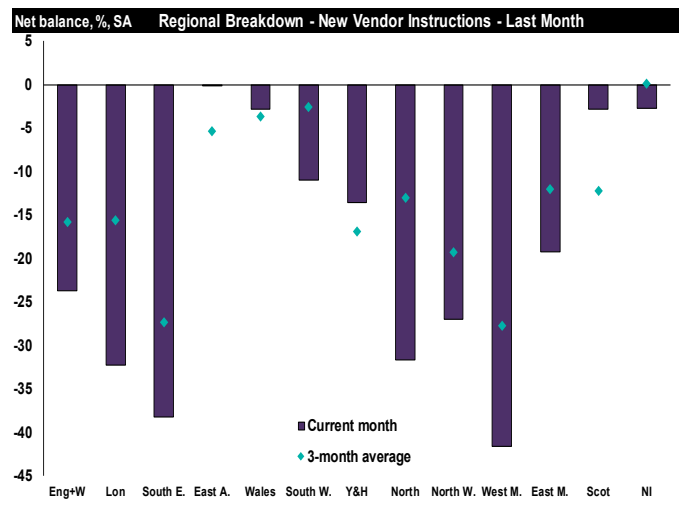
Regional Enquiries - Past month



National New Vendor Instructions - Past month

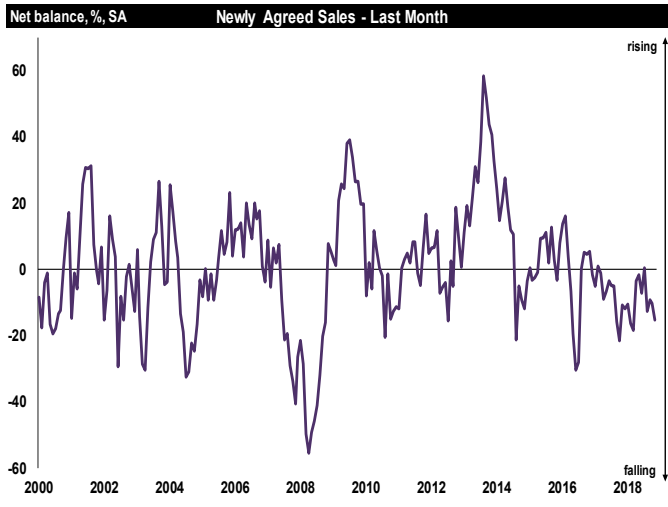


Regional New Vendor Instructions - Past month

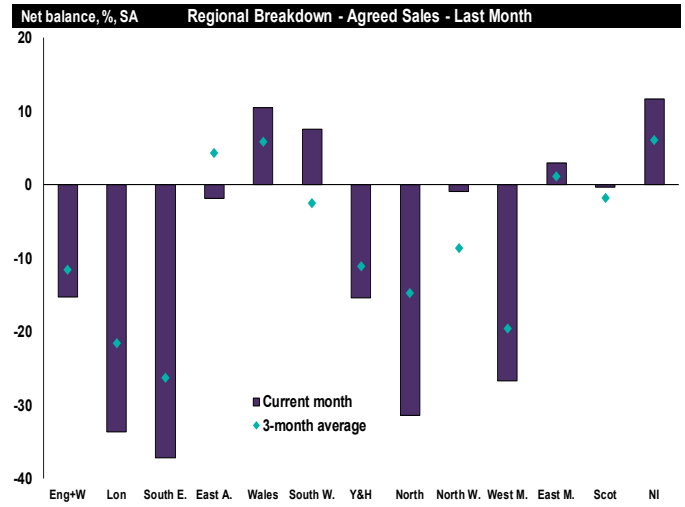


Sales market charts

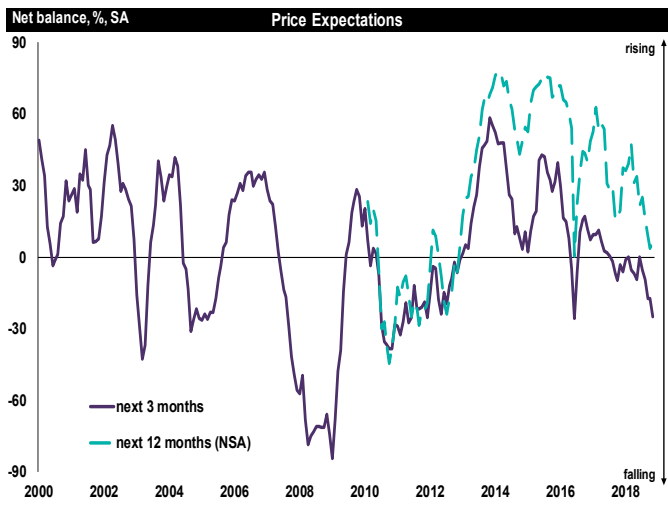
National Newly Agreed Sales - Past month



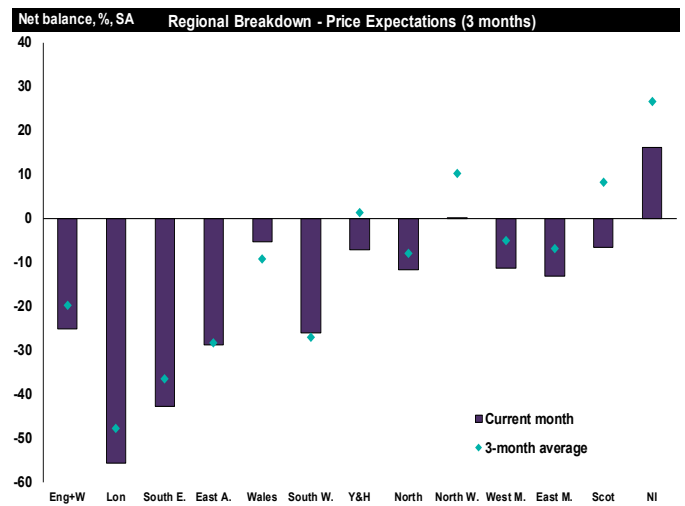
Regional Newly Agreed Sales - Past month



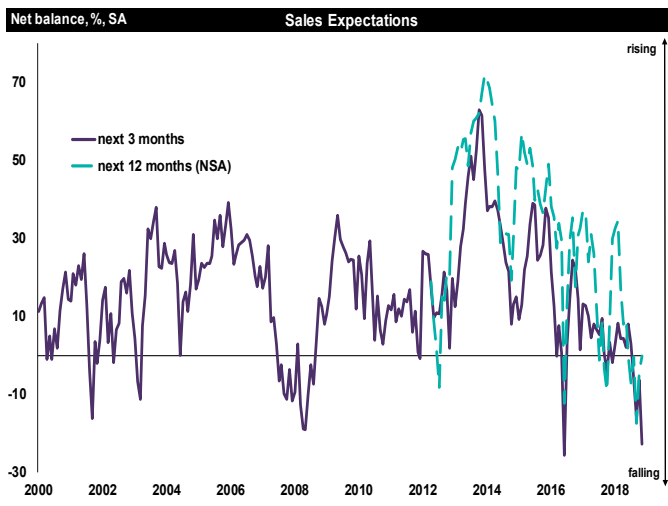
National Price Expectations - Three and twelve month expectations



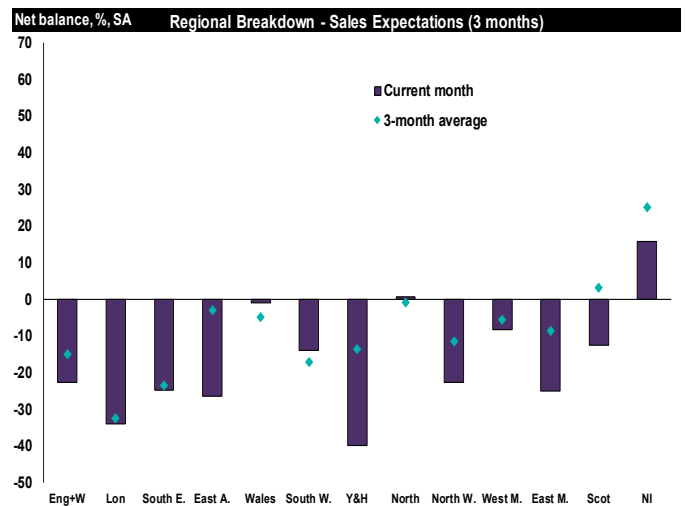
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

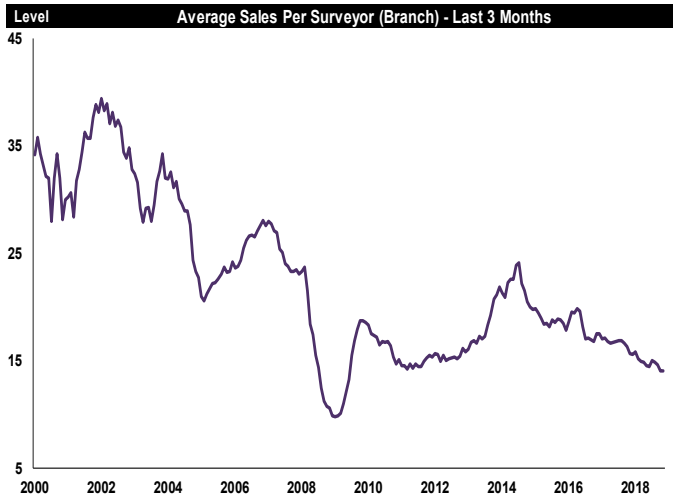


Regional Sales Expectations - Next three months

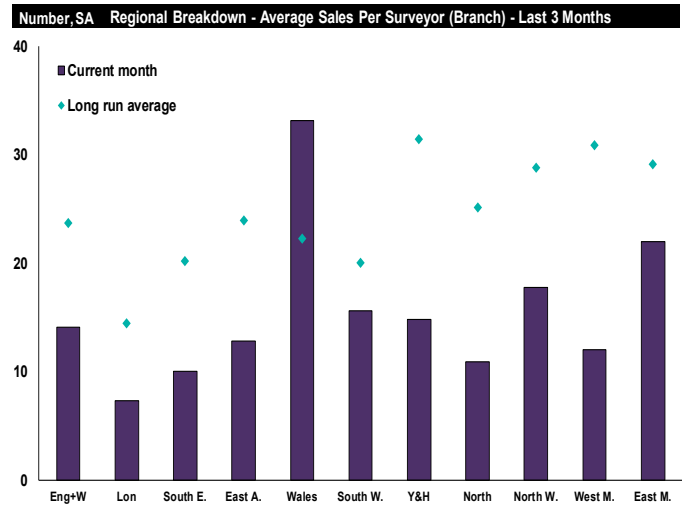


Sales market charts

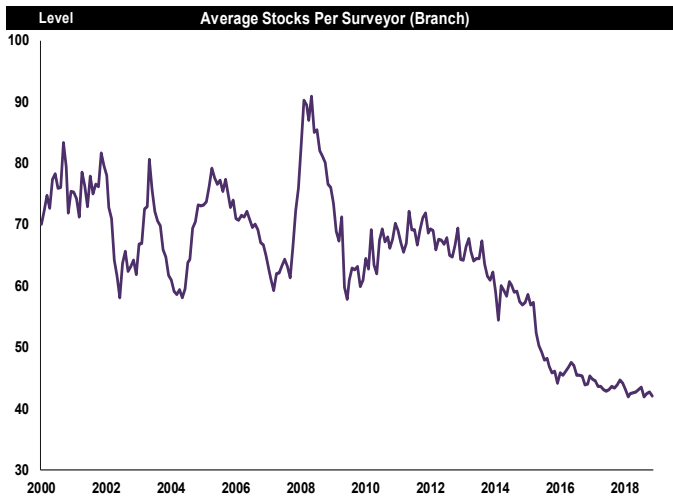
National Average Sales Per Surveyor - Past three months



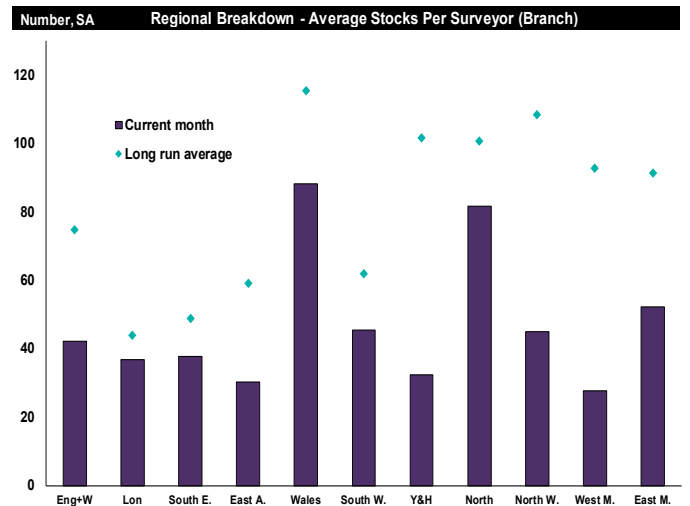
Regional Average Sales Per Surveyor - Past three months



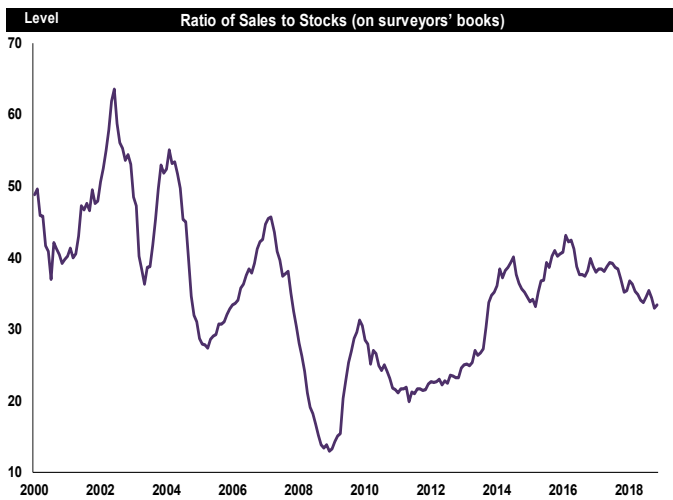
National Average Stocks Per Surveyor



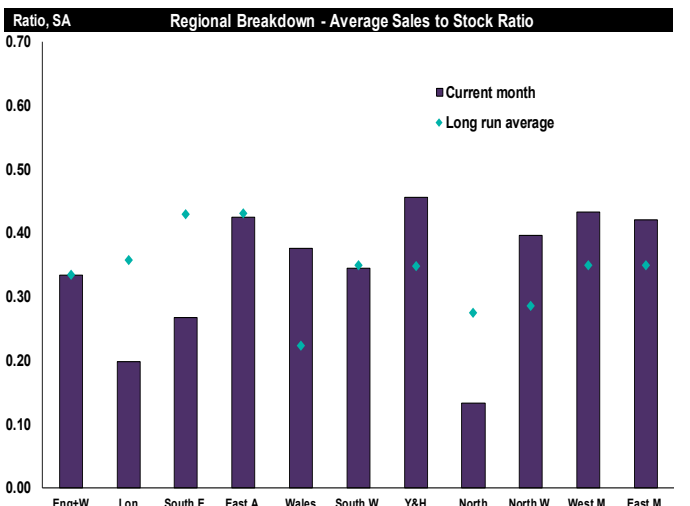
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

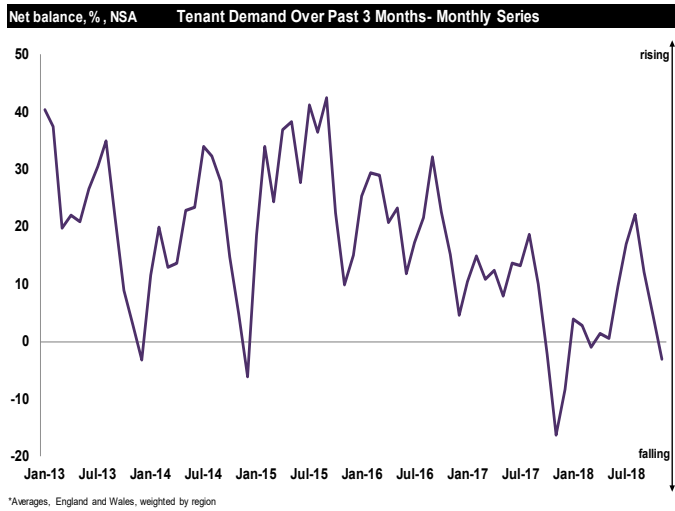


Regional Sales to Stock Ratio

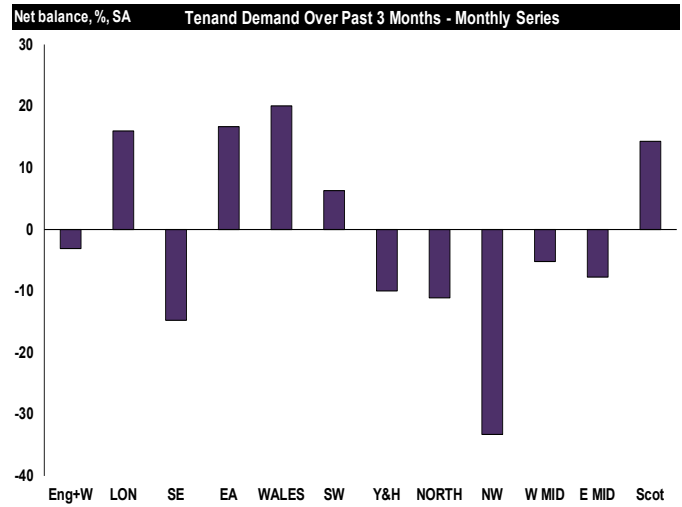


Lettings market charts

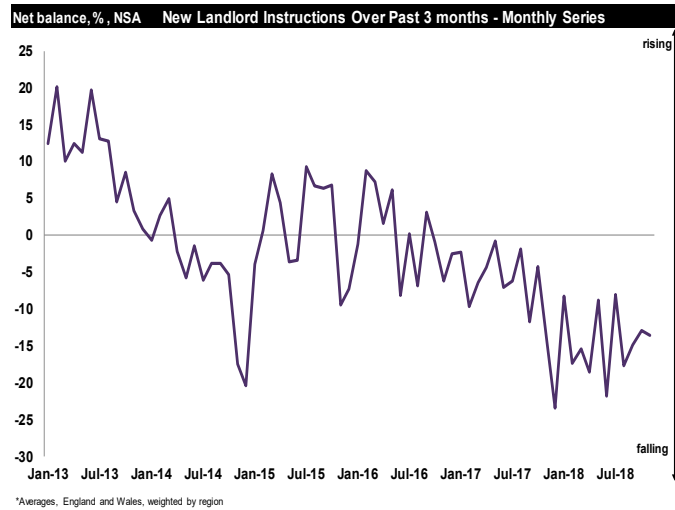
National Tenant Demand - Past three months



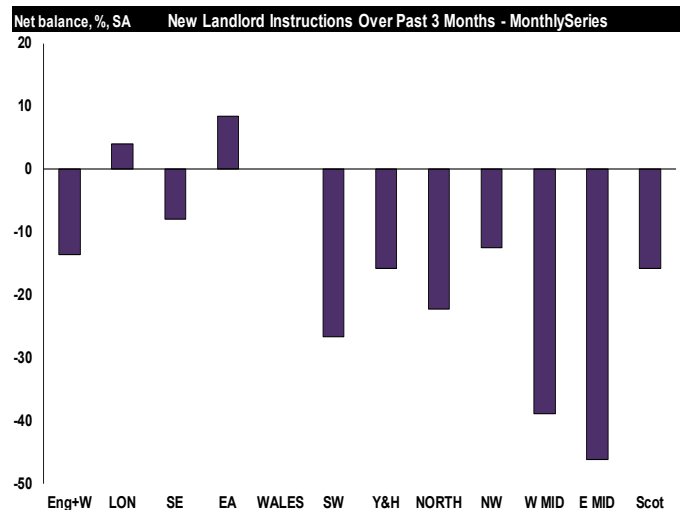
Regional Tenant Demand - Past three months



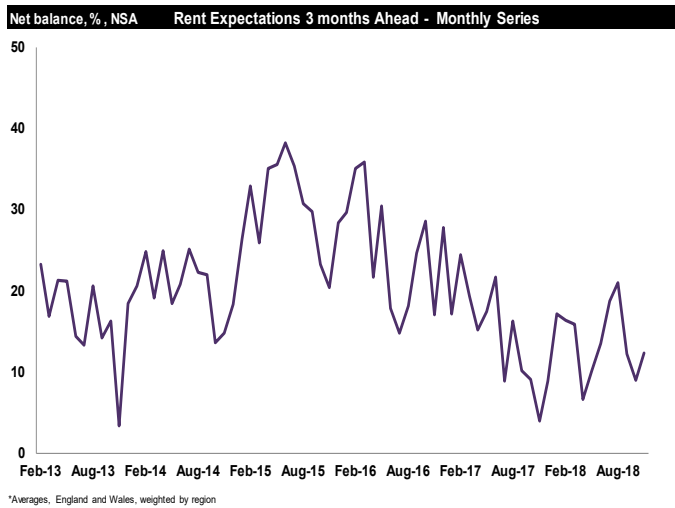
National New Landlord Instructions - Past three months



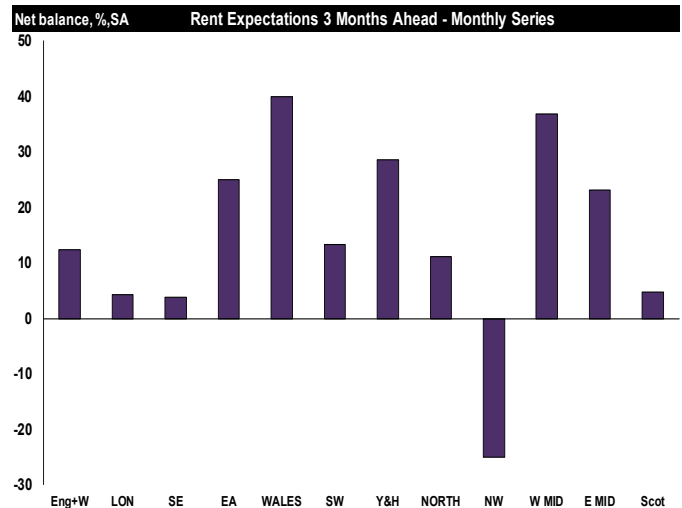
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

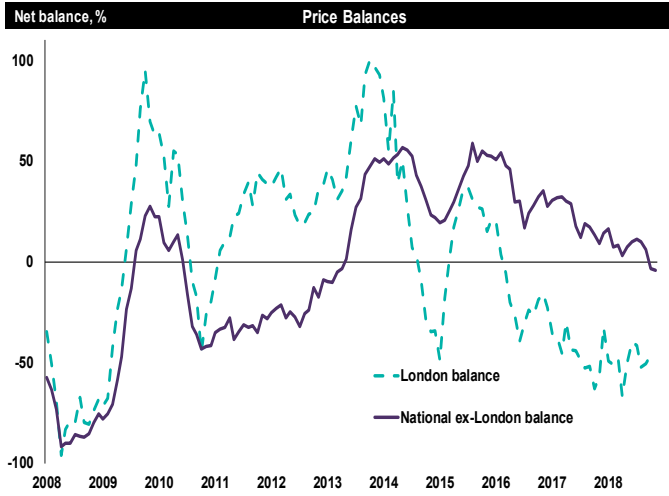


Regional Rent Expectations - Next three months

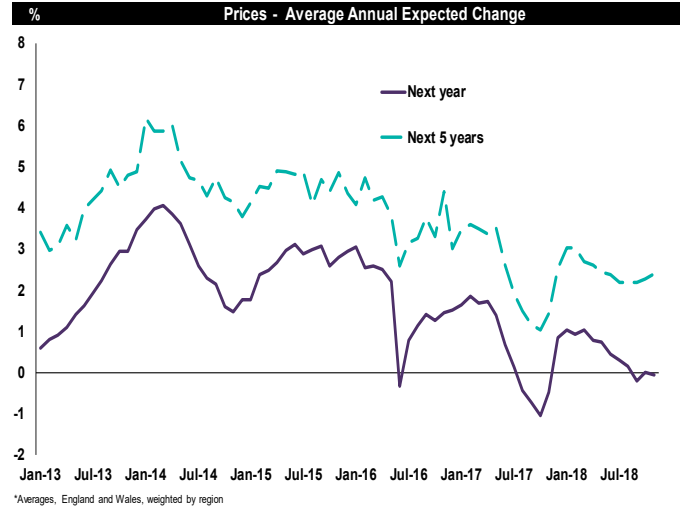


Expectations & other data

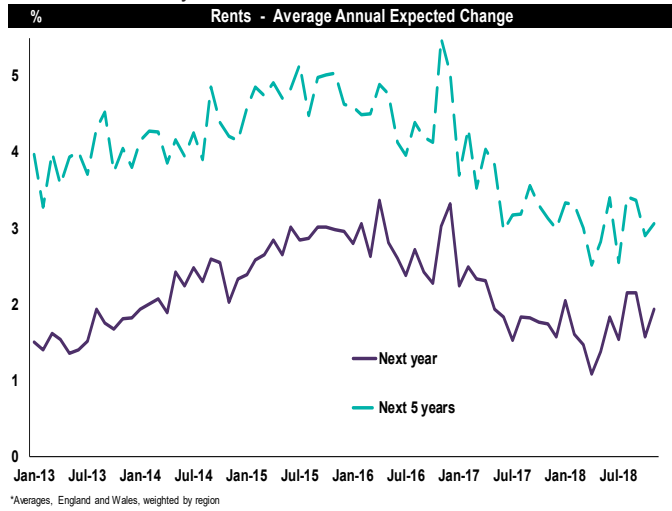
National Price Balance (excluding London) and London Price Balance - Past three months



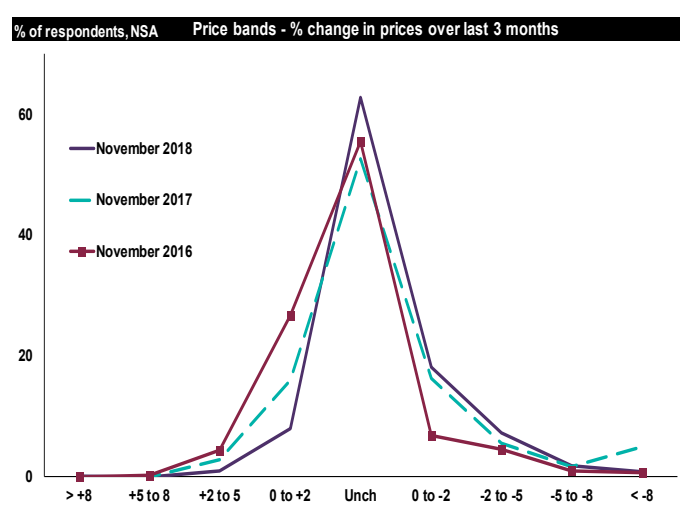
National Average Annual Expected Price Change (point estimate) - Next one and five years



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



Price Bands - Past three months



Surveyor comments - sales

North

JC Arundel, MRICS, Co. Durham, GSC Grays, jca@gscgrays.co.uk - Very cautious approach to new instructions; time of the year and Brexit a concern generally.

Michael Hodgson, MRICS, Sunderland, Michael Hodgson, 0191 5657000, Michael@michaelhodgson.co.uk - Slowing market.

T H Brannen, FRICS, Coastal NE, Brannen & Partners LLP, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Instructions are 15% up on the same time 12 months ago, and still good level of sales being tied up.

Neil Foster, FRICS, Hexham, Foster Maddison Property Consultants, 01434 605441 - Remarkable longevity to the 'selling seasons' this year with consistent activity and new registrations continuing well into November despite all the political shenanigans.

Paul McSkimmings, BSc (Hons) MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com - Quieter month compared with the previous year. Buyers' confidence appears to be affected by protracted Brexit negotiations.

Simon Bainbridge, MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com - Good transaction levels over the last month but market slowing as Christmas approaches.

Yorkshire

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361, alex.mcneil@bramleys1.co.uk - Despite current uncertainty, the local market remains resilient for the time being and the anticipated ripple effect from the slowing in the South has not yet reached West Yorkshire.

Ben Hudson, MRICS, York, Hudson Moody, 01904 650650, www.hudson-moody.com, benhudson@hudson-moody.com - Brexit uncertainty causing sellers and buyers to hold back, although it appears they do wish to move.

Chris Clubleby, FRICS CAAV, Market Weighton, Clubleys, 01430 874000 - The market is currently being affected by the uncertainty of Brexit and potential interest rate rises. We expect the market to remain difficult for the next 2 years

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fsl.com - For the time of year, the sales market in and around Wakefield has continued to be busy.

I Adams, MRICS, East Riding of Yorkshire and Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - Higher end of the market sluggish, East Riding prices still holding strong due to short supply but Hull struggling.

James Brown, MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - Brexit is on everyone's mind at the moment and the sooner stability can be reached the better for the housing market.

John E Haigh, MRICS FAAV, Knaresborough, Lister Haigh (Yorkshire) Ltd, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk - Market stagnation due to Brexit uncertainty and increased housebuilder supply, particularly for the incentives for First Time Buyers.

Kenneth Bird, MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - Nervous market against a backdrop of Brexit, however sales are holding up better than expected.

M J Hunter, MRICS, Doncaster, Grice and Hunter, 01302360141, www.gricehunter.co.uk, griceandhunter@btconnect.com - The Brexit negotiations are now becoming farcical and affecting confidence. The thought that anything could happen in the next few months is a very worrying prospect.

Mike Darwin, MRICS, Northallerton, M W Darwin, 01609 773567, www.darwin-homes.co.uk, info@darwin-homes.co.uk - Uncertainty in the market due to Brexit, impossible to predict what will happen next year. The public needs confidence in the future, but at the moment it is not there.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Steady market for the time of year especially for well presented properties. Christmas slow-down not yet noticed.

Peter Green, Halifax, Brearley-Greens, 01422 33088 - Christmas is virtually upon us which always has a detracting effect on the market. Obviously, Brexit and its eventual effects are likely to affect the market.

North West

Derek Coates, MRICS, Liverpool, Venmore, 0151 236 0301, www.venmore.co.uk, d.coates@venmores.co.uk - Quite a busy month with good level of new instructions. However signs of a downturn with Christmas looming. Increasing evidence that Brexit is causing would-be vendors to reconsider.

John Halman, MRICS, Wilmslow, Gascoigne Halman, 01625 460 344, www.gascoignehalman.co.uk, jane@gascoignehalman.co.uk - Everybody is holding their breaths. If we have a soft landing, next year will be reasonable. If not, all bets are off.

John Williams, FRICS, MEWI, Wirral, Brennan Ayre O'Neill LLP, 0151 343 9060, www.b-a-o.com, john@b-a-o.com - Activity levels now receding due to economic uncertainty and the onset of the festive season

Stephen H Dodgson, BSc FRICS, Heswall, Wirral, Rainfords Chartered Surveyors, 0800 612 7957, <https://charteredurveyor.cheshire.co.uk/>, steve.dodgson@live.co.uk - Noticeable slowdown in the number of survey instructions in November. At this stage, difficult to differentiate between Brexit uncertainty and seasonal time of the year.

East Midlands

D. Pidgeon, Nottingham, dpidgeon@portlandsurveys.co.uk - The "Brexit" effect is definitely taking hold of the top of the market and will migrate down. In my view, this will continue over the next 2-5 years until we (hopefully) have a resolution.

Chris Charlton, FRICS, Nottingham, Savills, 01159348020, www.savills.com, ccharlton@savills.com - As we head to the year end we are feeling a market lacking confidence in the short term future. Great time to buy with great longer term predictions for the East Midlands

Christopher Shallice, FRCS FAAV, Holbeach, Hix & Son, 01406 422 777 - More activity but prospective purchasers' negotiating very hard on asking prices.

Daniel Elliott, MRICS, Chesterfield, Wilkins Vardy, 01246 270123, www.wilkins-vardy.co.uk, dan@wilkins-vardy.co.uk - Reasonable business levels but plenty of Brexit uncertainty in our daily conversations.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Brexit still causing uncertainty. Instructions/sales slow.

Surveyor comments - sales

David Hawke, FRICS, Worksop, David Hawke & Co., 01909 531450 - Unexpected increase in general activity, with a good month for exchanges. Still a very subdued market though!

Mark Newton, FRICS, Grantham, Newton Fallowell, 01476 591900, www.newtonfallowell.co.uk, mark.newton@newtonfallowell.co.uk - November continued to confound expectations with activity up on all areas over last year and we are now 17% up on instructions YTD.

Paul Perriam, BSc (Hons) MRICS, Nottingham, William H Brown/Bagshaws Residential, 01332 542299, www.sequencehome.co.uk, paul.perriam@sequencehome.co.uk - Lower instruction and sales numbers reflecting the general uncertainty which currently exists in the wider economy.

Q A Jackson-Stops, FRICS, Northampton, Jackson-Stops, 01604 632991, www.jackson-stops.co.uk, quentin.jackson-stops@jackson-stops.co.uk - In spite of Brexit, November has seen our highest number of contract exchanges in 2018. In relative terms, property in the East Midlands is good value and the best continues to find a ready market.

Stephen Gadsby, BSc FRICS FSA, Derby, Gadsby Nichols, 01332 296396 - Usual seasonal downturn in market activity just started but still healthy demand for realistically priced products.

Tom Wilson, MRICS, Stamford, KingWest, 01780 484 520, www.kingwest.co.uk, twilson@kingwest.co.uk - Brexit has reduced liquidity through both Vendor and Buyer uncertainty without question. People do not appear to be moving unless they have to.

West Midlands

Alex Smith, FRICS, Birmingham, Alex Smith & Co., 0121 784 6660, www.alex-smith.co.uk, alex@alex-smith.co.uk - Slight reduction in values and reluctance of Vendors to reduce asking prices slowing sales agreed.

Andrew Grant, FRICS, Worcester, Andrew Grant, 01905 734735 - Brexit.

Andrew Oulsnam, MRICS, Birmingham, Robert Oulsnam & Co., 0121 445 3311 - Brexit uncertainty.

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A good month for sales but market appraisals are down and the general feeling is that the public is going to be cautious and will wait to see how Brexit plays out before making any decision to move next next year.

J J Dell, MRICS FAAV, West Midlands, J J Dell & Co., 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - The market has slowed down due to Christmas being around the corner.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600, - A sales market quietening as Christmas approaches. Some new instructions but less volume than earlier this year. Enquiries also easing due to seasonal slowdown.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - As the year draws to an end, overall a very positive property sales market. Steady demand has led to higher prices, but property still affordable.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Fewer properties coming for sale, likely due to time of year. New instructions needed to stimulate enquiries, but unlikely to happen as Christmas approaches.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Less property coming for sale due to time of year, but overall a year where there has been good enquiries and many properties have been sold.

Mark Wiggin, MRICS, Ludlow, strutt and Parker, mark.wiggin@struttandparker.com - Caution is now the key word; people will perform but with caution.

Mike Arthan, FRICS, Shropshire, Barbers, m.athan@barbers-online.co.uk - Typical November market slowdown, although with all the political and economic uncertainty not as bad as expected.

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Brexit still casting a massive shadow on the market; until aspirational purchasers know the impact of the changes, they will watch from the sidelines.

Rose Cheadle, AssocRICS, RICS Registered Valuer, Wolverhampton, Worthington Estates, enquiries@worthingtonestates.co.uk - This month we have experienced a slow down in both properties coming to the market and new buyer enquiries.

Ryan Williams, FRICS, Hay-on-Wye, McCartneys LLP, ryan@mccartneys.co.uk - Surprisingly busy on sales despite the doom and gloom. Shortage of new instructions as sellers hesitate mean that buyers are limited in choice so are unable to negotiate large reductions.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - There seems to be a general sentiment that potential buyers/viewers are very cautious at the present time and they are indicating that they are concerned potentially regarding Brexit.

Tim Hughes, MRICS, Wombourne, Bartlams, 01902 894141, www.bartlams.co.uk, Timhughes@bartlams.co.uk - Throughout the year we have experienced a lack of new instructions which has been experienced by other agents in our area. This situation has been worsened by the proliferation of on-line agencies.

East Anglia

Chris Philpot, FRICS, Stowmarket, Suffolk, Lacy Scott and Knight, www.lsk.co.uk, cphilpot@lsk.co.uk - Still surprisingly busy, but we now detect the start of a seasonal slowdown.

David H Knights, MRICS, Ipswich, Dav9id Brown & Co, 01473 222266, davidbrown-ipswich.co.uk, mail@davidbrown-ipswich.co.uk - The seasonal downturn which has affected both sales/new instructions started earlier this month; very little has happened - a lot is to do with the uncertainty surrounding Brexit and the somewhat irresponsible scaremongering from the Bank of England.

Ed Russell, Bury St Edmunds, Jackson-Stops & Staff, 01638 662231 - Plenty of stock although buyers seem to be battenning down for the winter and awaiting Brexit outcome.

James Steggles, FRICS, Norwich, Stackyard Estates Ltd, james@fliintuk.com - Vendors unwilling to reduce prices - would rather withdraw property from market.

Jeffrey Hazel, FRICS, Kings Lynn, Geoffrey Collins & Co., 01553 774135 - Limited numbers of properties coming to market but demand remains steady.

Kevin Burt-Gray, MRICS, Cambridge, Pocock & Shae, kevin@pocock.co.uk - Christmas slowdown and Brexit uncertainty. Buyers still uncertain and taking time to commit. My feeling is that if we can get some positive news on Brexit during the next few months then activity is likely to pick-up.

Mark Duckworth, AssocRICS, Ely, Martin & Mortimer, 01353 661222, martinandmortimer.co.uk, mark.duckworth@martinandmortimer.co.uk - Within the Cambridge subregion, i.e. 25 mile radius of the city, the inherent demand and levels of business activity remain as they were. However, the Brexit effect is best described as a cold and wet blanket which is depressing appetite for property.

Surveyor comments - sales

Mark Wood, MRICS, Cambridge, Carter Jonas, 01223 403330, mark.wood@carterjonas.co.uk - Generally quieter, enquiries significantly down, resulting in reduction in sales. Not unusual for this time of year as the market is slowing towards Christmas.

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - A slowing market but buyers are still out there for the right property sensibly priced.

Richard Bannister, MRICS, Felixstowe, Bannisters, 01394 276828, www.bannisterco.com, rwb@bannisterco.com - Average salaries aren't increasing significantly so affordability is still limited which has held back starter home values. Families are moving mostly through necessity rather than choice so sales of 3 bed properties is still the most active sector.

South East

Anthony EWebb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - The property market is now very quiet due to Brexit concerns, Mark Carney's statement regarding lower property prices and excessive Stamp Duty.

David Boyden, MRICS, Colchester Head Office, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk - Surprisingly good level instructions for this time of the year. Fear some vendors trying to shift property before Brexit uncertainty. Good quality viewings but volumes down. Right property at right price - sales still being done.

David Nesbit, FRICS, Portsmouth, D.M.Nesbit & Company, 023 9286 4321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - Brexit, the Bank of England and Christmas - what more to depress sentiment! A very difficult period is ahead.

David Parish, FRICS, Upminster, Gates Parish & Co., 01708 250033, - The market is now quiet in the approach to Christmas. The number of new instructions and newly agreed sales are down. There is unlikely to be any improvement until the New Year.

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

Edward Seymour, MRICS, Lewes, Strutt & Parker, 01273 407014 - The market remains subdued, partly for the time of year and the fact that buyers and vendors are becoming even more pessimistic about the outlook of the market.

Guy Kissick-Jones, MRICS, Witney, Leys Longden and Co, guy@leyslongden.co.uk - The market has stagnated, reduced confidence in buyers, likely as a result of both the state of Brexit and the time of year.

Ian Perry, FRICS, Faringdon, Fairford Lechlade Highworth Witney, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - Market is quieter as we approach Christmas.

James Farrance, FARLA, MNAEA, Maidenhead, WD Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Uncertainty over Brexit and punitive measures towards home ownership and buy to let such as stamp duty is causing hesitancy amongst buyers.

John Frost, MRICS, Amersham, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Brexit and Christmas are a reason for people delaying moving and buying.

John Frost, MRICS, Ashford, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - More and more people we are talking to are blaming 'Brexit' for delaying buying and selling.

John Frost, MRICS, Beaconsfield, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - The market remains difficult but there are deals being done but at reduced prices as Brexit has caused uncertainty. The buyers have the money but are cautious about how much to spend.

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Political chaos - cannot judge the market going forward until we know what type of Brexit the country will have. Currently predictably dire.

John Frost, MRICS, Langley, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - There is activity but only on properly priced property. Many buyers are looking for 'deals'; if a better offer is available their interest will move.

John Frost, MRICS, Slough, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Uncertainty over Brexit, interest rates, the economy and the knock-on effect on the housing market.

John Frost, MRICS, Windsor, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Whilst Brexit unsettled the market, we also continue to see little or no activity in the Buy to Let sector due to stamp duty levels.

John Frost, MRICS, Staines, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Brexit and Christmas having an obviously negative effect on pricing.

John Road, MRICS, Burnham, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Market is slowing due to the season but is further encumbered by uncertainty from the politics to the weight of increased costs of moving by way of government taxes.

Keith Fox, FRICS, Eastbourne / Brighton, Keith Fox Surveyors, 01323489116, keithfox10@gmail.com - Brexit.

Mar Everett, FRICS, Epsom, Michael Everett & Co, markeverett@michael-everett.co.uk - Buyers might look back on Q4 2018 as a missed opportunity to buy at a real discount... or will they all be right? Deal or no deal, that is the question.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - Mid and upper market continues to be poor but at the lower end of the market there is plenty of interest.

Michael Brooker, FRICS, Crowborough East Sussex, Michael Brooker, 01892 663377, michaelbrooker.co.uk, michael@michaelbrooker.co.uk - Brexit a big black cloud. Activity levels low. Sense pent-up demand.

Tim Green, MRICS, South Oxfordshire, Green & Co., 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - The Indian summer came very late and this area has seen the strongest 8-week period for the entire year. With the festive season looming that will inevitably pause until New Year by which time the latest political headlines will be leaving their mark.

Tim Hook, FRICS, Tunbridge Wells, Bracketts, tim.hook@bracketts.co.uk - Uncertainty with Brexit causing slowdown of instructions.

South West

Christopher Bailey, MRICS, Exeter, Knight Frank, christopher.bailey@knightfrank.com - The quieter market conditions normally associated with the winter months arrived in late November. SDLT remains a more influential factor than any concerns associated with Brexit.

Surveyor comments - sales

David McKillop, FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk - A good start to the month, but it has now slowed down. We have had a lot of price reductions - some successful, some not. Majority of valuations at present are for family reasons.

David Robinson, AssocRICS, North Cornwall, Stags, d.robinson@stags.co.uk - Vendors who are sensibly priced are getting interest but a crescendo of Brexit confusion has meant a lot of buyers and sellers are sitting on the fence awaiting Spring market.

G C Thorne, FRICS, East Dorset, Thornes, 01202-684004, www.thornes.org.uk, graham@thornes.org.uk - The market continues at a low level now awaiting the Brexit vote.

Ian Perry, FRICS, Cheltenham Cirencester Nailsworth Stroud tetbury, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - Market is less buoyant as we lead into Christmas, little confidence at present.

James McKillop, MRICS, South West UK, Knight Frank LLP, 0207 861 1528, james.mckillop@knightfrank.com - Focused vendors are having to absorb the ongoing uncertainty by considering lower offers but deals are still being agreed.

James Wilson, MRICS, Shaftesbury, Jackson-Stops, 01747 850858, jackson-stops.co.uk, james.wilson@jackson-stops.co.uk - In terms of deals done, November has been better than anticipated.

Jeff Cole, MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - The market is showing signs of uncertainty, however there are some good buyers and competitive pricing is the key. Mid-November is generally when things slow down pre-Christmas, however this month seemed a little quieter than usual.

Jeremy Priestley, FRICS, Poole, Berkeleys, 01202 708383, www.berkeleys.com, jeremy.priestley@yogroup.co.uk - The market shows sporadic signs of life but is unlikely to settle into any pattern ahead of Q2/2019, post-Brexit.

John Corben, FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - The market has certainly slowed. There is a lack of property coming to the market. Sales are taking an inordinate time to complete. Lenders are reluctant to incur costs in these uncertain times.

Julian Bunkall, FRICS, Dorchester, Jackson-Stops & Staff, 07970 972974 - To be honest, until Brexit is resolved it is very difficult to predict a future market. My view is if a deal is agreed, the market will increase; no deal and we may have an average fall of 10% - 20% but eventually it will settle down.

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622, - It seems a quieter time with Christmas coming up. Brexit uncertainty may not be helping either. That said, cottages under £500,000 are in big demand.

Mark Lewis, FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - There has been the inevitable seasonal slow down but we have a property auction on 14 December and the enquiries, so far, has been very good.

Matthew Harvey, MRICS, Bourton-on-the-Water, Tayler & Fletcher, 01451 820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - Pipeline of transactions significantly lower, however improving with relatively limited demand matching supply.

Miles, Totnes, Chartsedge, 01803 505115, miles@chartsedge.co.uk - Brexit is making the market feel very unsure with buyer and seller confidence at an all time low. We think it is worse than the 2008 crisis.

Nick Cragg, FRICS, Chipping Sodbury, Country Property, 01454 321339, countryproperty.co.uk, nickcragg@countryproperty.co.uk - Negative attitudes and unfounded speculative scaremongery, led by the BBC, are unsettling people; unsettled people tend to defer property moves - as witnessed during the 1988 - 1998 property recession, which was also caused by Government policies.

Oliver Miles, FRICS, Swanage, Oliver Miles, 01929 426655, www.olivermiles.co.uk, olivermiles@olivermiles.co.uk - The seasonal slow down is more pronounced than recent years and is not helped by the uncertainty of Brexit and future economy.

Ashley Rawlings, MRICS, Dorset, Savills, ashley.rawlings@savills.com - Buyer confidence is low owing to the political climate. The will to trade is there but the anxiety is stronger in many cases.

Robert Cooney, FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230230, robertcooney.co.uk, robert.cooney@robertcooney.co.uk - In November, we achieved more sales than in any other month this year, several with 'best bid' scenarios. Certainly not what was anticipated under present conditions!

Roderick Thomas, FRICS, Wells, Roderick Thomas, 01749 670079, www.roderickthomas.co.uk, rdt@roderickthomas.co.uk - Brexit uncertainty having a big impact and reducing demand.

Roger Punch, FRICS, South Devon, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - Buyers are available for those properties that come to the market, despite the season: it is only sellers' lack of confidence in the economy that is limiting the market.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - November was a much quieter month on all fronts compared to November 2017. However, we agreed far more sales than last month! I am bemused over the Governor of the Bank of England's views on the property market.

Tim Maggs, MRICS, Bristol, Maggs & Allen, 01179734049, Timm@maggsandallen.co.uk - Subdued.

Wales

Andrew Morgan, FRICS, Lampeter, Morgan And Davies, 01570423623, morgananddavies.co.uk, lampeter@morgananddavies.co.uk - Seasonally quieter. However, Stamp Duty continues to dampen enthusiasm to the market generally. Those moving generally have too.

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Seasonally, activity usually slows, which is the case for viewings, but perversely, the number of valuations and new properties coming onto the market has increased.

David James, FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - Quieter month, not sure if it is because of the time of year or the market slowing.

Paul Lucas, FRICS, Haverfordwest, R.K. Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Market activity is declining in the approach to the Christmas period - which is normal for this time of year.

London

Ben Temple, MRICS, London, Regent Property, 02087439101, www.regent-property.com, ben@regent-property.com - The market continues to be challenging unless a property appears cheap. We have achieved some offers in excess of asking price.

Surveyor comments - sales

Christopher Ames, MRICS, Belgravia/London, Ames Belgravia, 020 7730 1155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - A flurry of sales have been agreed for those wishing to settle by end of 2018. In particular, demand has increased for short lease properties (sub-20 years) to tide buyers over the Brexit uncertainty.

J.J.King, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Front line activity remains slow. Applicant registrations and valuation appraisals haven't quite fallen off the cliff. Much time is spent keeping current sales agreed on track. Roll on the 31st December.

J.J.King, FRICS, Merton, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - The lead up to Xmas has remained subdued. With applicant registrations down, this has helped in price reductions leading to a higher number of viewings. Results remain mixed.

James Gubbins, MRICS, Pimlico, Dauntons, 020 78348000, www.dauntons.co.uk, mail@dauntons.co.uk - Domestic buyers remain cautious as we draw closer to Brexit with concerns over the market direction. Foreign buyers scarce.

James Perris, MRICS, London, De Villiers, 0207 887 6009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Pockets of activity although overall a very subdued market. Unlikely to be much changed until Brexit is finalised.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Political uncertainty undermining confidence so reducing activity. Some prospective purchasers are asking whether they should buy now as prices may be lower in a few months. Pent up demand could result in a significant rebound once clarity returns.

John Collard, Wimbledon Common, Robert Holmes & Co., 020 8879 9669 - Brexit causing uncertainty. Slower market in build up to Christmas. Maybe higher SDLT for foreign buyers.

Mr Barinder Bhalla, MRICS, DipHI, CEA, Hounslow (West London Specialist), Acrewoods Chartered Surveyors, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - BOE reports of a 30% drop in house prices if no Brexit is fueling uncertainty in the housing market. At the end of 2018 the market is subdued. Sellers brace themselves for falling house prices going into 2019, helped by political uncertainty.

Richard Taylor, MRICS, London, London's Surveyors & Valuers, 0207 749 7178, www.londonssurveyors.co, richard@lcsv.co.uk - Recently, there have been signs of a market recovery, just glints of sunlight through clouds. A long way to go, but it's something.

Robert Green, MRICS, Chelsea, John D Wood & Co., 020 3369 1343 - Uncertainty over Brexit the main issue. Many sales agreed only once a second potential buyer is found and competition ensues. Some good prices being achieved by patient vendors, but market well off the peak. A good time to buy.

Robert Green, MRICS, Belgravia, John D Wood & Co., 020 3369 1343 - We are seeing a steady flow of buyer registrations, but the quality stock is still not around. Brexit does still hinder us (i.e. uncertainty) but we expect a good 2019.

Robert King, Teddington, Jackson-Stops & Staff, 020 8943 9777 - Christmas and Brexit uncertainty.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - Uncertainty in the central London market continues to impact the number of transactions. Many of our offices have a pipeline of sales to exchange this month; there are worries that many of these sales will not proceed.

Tom Dogger, MRICS, London, B N Investment Ltd, www.bakken Neptune.com, tdogger@bninvestment.co.uk - There are increasingly attractive buying opportunities as prices continue to soften. Expect continued chaos over Brexit but, once there is certainty, the market will settle.

Scotland

Alex Inglis, MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com - Property enquiries and viewing numbers are down as we move towards Christmas. However, it is still a sellers market and we have seen an increase in newly agreed sales over the last month. Buyers who are active at this time of year tend to be serious.

Chris Hall, MRICS, Edinburgh, Rettie and Co, 01312204160, www.rettie.co.uk, chris.hall@rettie.co.uk - Market very stratified in demand dependent upon value and location.

Craig Henderson, MRICS, Ayrshire, Graham & Sibbald, 01292 271030, www.g-s.co.uk, craig.henderson@g-s.co.uk - We move towards the festive period, and due to shortage of properties on market, sales remain strong - this is a good time to sell! The vendor can control date of entry!

David Cruickshank, MRICS, Elgin, D M Hall, 01343 548 501, david.cruickshank@dmhall.co.uk - Residential property is generally selling well, with around half of the transactions completing within 3 months. There remains minimal demand for poor quality/poorly located property, the value of which has diminished in real terms.

Graeme Lusk, BSc MRICS, Glasgow and Renfrewshire, Walker Fraser Steele, 01412210442, www.walkerfrasersteele.co.uk, Graeme.lusk@walkerfrasersteele.co.uk - Home report instructions have slowed, I presume down to the seasonal downturn. Although I would still recommend putting your house on the market, as there is a shortage on stock on the market.

Greg Davidson, MRICS, Perth, Graham + Sibbald, 01738 445733, www.g-s.co.uk, gdavidson@g-s.co.uk - The market has been strong this year with a lot of good sales. The festive slowdown seems to have come a bit early. The general feeling is that the market will start strongly in 2019 but the politicians will have their part to play in this.

Ian C. McCredie, MRICS, Glasgow area, West/Central Scotland, McCredie Scott, 07768 298868, ianmccredie@mac.com - Wide area in Central Scotland surveyed. Varies from area to area.

Ian J Fergusson, FRICS, Stirling, Shepherd, www.shepherd.co.uk, ian.fergusson@shepherd.co.uk - Strong end to the year with November showing a bounce from a flat October

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - November was a busier month for sales and new properties offered for sale probably attributed to a mild autumn. Political uncertainty still dictates the market.

James Aitkenhead, MRICS, Helensburgh, Allied, jim.aitkenhead@alliedsurveyorsscotland.com - Brexit.

John Brown, FRICS, Edinburgh, John Brown and Company, 07768583919, jb-uk.com, john.brown@jb-uk.com - Winter has arrived - traditional slowdown n enquires and instructions. Many sellers await the Brexit decision and a sense of the potential outcome. Prices adjusting towards home report valuation - less competition. Seasonal change, still positive.

Kevin Hay, MRICS, Ayrshire, Allied Surveyors, 01292 265381 - There has been a decrease in the number of properties being exposed to the market.

Linda Gove, MRICS, St Andrews Fife, J & E Shepherd, l.gove@shepherd.co.uk - Unexpected slow down in sales over last month.

Surveyor comments - sales

Marion Currie, AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com - Stock levels are low due to the good level of sales achieved recently. Little or no mention of Brexit worries amongst either buyers or sellers in Dumfries & Galloway.

Paul Taylor, MRICS, Dundee, J & E Shepherd, 01382 200454 - Severe lack of stock.

Peter Drennan, BSc MRICS, Edinburgh, Allied Surveyors Scotland, 0131 226 6518, peter.drennan@alliedsurveyorsscotland.com - It is the quiet season and likely to get quieter closer to Xmas. Heaven knows what will happen next year. Keep head down, carry on and hope Brexit works out. Still some top end private deals being done.

Richard A Clowes, MRICS, Scottish Borders, DM Hall LLP, 01896 752009, www.dmhall.co.uk, richard.clowes@dmhall.co.uk - A busier than expected November. Has this been caused by sellers getting property on the market before the "Brexit" vote and the unknowns of 2019, or just sellers getting property onto the market before the Christmas slow?

Roderick Macdonald, FRICS, West Lothian, DM Hall LLP, 01506 490404, rodny.macdonald@dmhall.co.uk - Sales are easing off as we approach Christmas which is normal for this time of year.

Northern Ireland

Daniel Mc Leron, FRICS, Omagh, Co. Tyrone, Mc Leron Estate Agents, 02882 242772, www.mclernonestateagents.com, info@mclernonestateagents.com - Activity traditionally slower at this time of year. Uncertainty over Brexit and the prediction that house prices may fall is starting to affect the market.

Gareth Gibson, FRICS, Belfast, Douglas Huston, 02890683711, www.douglashuston.com, gareth@hustonestateagents.com - Sales market proving challenging with stock levels continuing to fall and buyers acting with caution.

Kirby O'Connor, AssocRICS, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - The sales market has been very strong and has continued into November which is very unusual for the time of year. But I feel there are some cautious clients with the unknown ahead.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - Heading into Christmas the market should slow down but it will remain buoyant in certain areas.

Stephen Fitzpatrick, MRICS, Newry Co. Down, Stephen Fitzpatrick & Co Estd.1881, 02830265533, www.stephenfitzpatrick.co.uk, info@stephenfitzpatrick.co.uk - Brexit, Back Stop and the overarching implications and uncertainty.

Surveyor comments - lettings

North

T H Brannen, FRICS, Coastal NE, Brannen & Partners LLP, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Valuations have decreased and we have seen many investment landlords deciding to withdraw from the PRS altogether.

Neil Foster, FRICS, Hexham, Foster Maddison Property Consultants, 01434 605441 - Stock continues to diminish (overall), building pressure on rents and an increased burden to tenants.

Yorkshire

Alex McNeil, MRICS, Huddersfield, Bramleys, 01484 530361, alex.mcneil@bramleys1.co.uk - There has been a slowdown in the number of new lettings which is in part due to the average tenancy term now being extended with lower voids. Shortage of good, modern and clean housing to let.

Ben Hudson, MRICS, York, Hudson Moody, 01904 650650, www.hudson-moody.com, benhudson@hudson-moody.com - Slowing towards Christmas

Chris Clubley, FRICS CAAV, Market Weighton, Clubleys, 01430 874000 - Rental demand will remain strong. We expect rental values to increase to compensate landlords for increased costs.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - Lettings continue to be as strong as ever.

I Adams, MRICS, East Riding of Yorkshire and Kingston upon Hull, Metropolis Surveyors, ianadams31@yahoo.co.uk - Very busy with pre-Xmas lettings and tenants wanting to be in; EU citizens still turning up in good numbers.

John E Haigh, MRICS FAAV, Knaresborough, Lister Haigh (Yorkshire) Ltd, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk - Lettings market remains fairly busy with a good number of new instructions. Tenant demand is slowing in run up to Christmas.

Mike Darwin, MRICS, Northallerton, M W Darwin, 01609 773567, www.darwin-homes.co.uk, info@darwin-homes.co.uk - Demand is lower, as it normally is at this time of year, but lettings are taking longer.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000, info@shieldgroup.uk.com - Still a steady market and the approach of Christmas has thus far had no effect.

Peter Green, Halifax, Brearley-Greens, 01422 33088 - Rental values at present static but activity continues quite good.

North West

John Halman, MRICS, Wilmslow, Gascoigne Halman, 01625 460 344, www.gascoignealman.co.uk, jane@gascoignealman.co.uk - Lettings continue to be challenging ahead of tenant fee ban.

East Midlands

D. Pidgeon, Nottingham, dpidgeon@portlandsurveys.co.uk - The lettings market may be more interesting - depending upon what happens to our economy, there could be a higher demand for family sized properties whilst demand for smaller dwelling may decrease.

Christopher Shallice, FRCS FAAV, Holbeach, Hix & Son, 01406 422 777 - Low demand. Applications varying in quality.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Lack of instructions from new landlords. Low demand from prospective tenants.

John Chappell, MRICS, Skegness, Property Office, 01754 763520 - Still very hard to find quality applicants for 1 bed flats. Landlords very wary of universal credit.

West Midlands

Andrew Grant, FRICS, Worcester, Andrew Grant, 01905 734735 - Fee ban and EPC Regs.

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - A steady month. Landlords seem reluctant to commit at the moment so the shortage of new instructions remains our biggest challenge.

J J Dell, MRICS FAAV, West Midlands, J J Dell & Co., 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Supply very slow but still a steady flow of tenants looking.

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, jennifer@harrisonpricehomes.co.uk - Steady demand, slowing down for Christmas as usual.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Still more properties needed to satisfy demand, and good quality properties that come available are letting well.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - A very busy month and enquiries likely to reduce as Christmas approaches; more properties needed to satisfy demand.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Good and steady demand for all types of rented properties with family 2/3 bedroomed houses still very much in demand.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - No shortage of enquiry for all types of rented properties throughout the area, and this year has seen some rental growth. 2019 likely to follow the same pattern as to availability of rental properties as 2018.

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

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Rental turnover is slowing in advance of the holiday season. Market still good for landlords and tenants albeit stock levels falling.

Ryan Williams, FRICS, Hay-on-Wye, McCartneys LLP, ryan@mccartneys.co.uk - Steady as we go. Less activity from buy to let end due to Brexit uncertainty and changes to taxation.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - The market seems to have quietened rather prematurely this year in advance of Christmas.

East Anglia

Chris Philpot, FRICS, Stowmarket, Suffolk, Lacy Scott and Knight, www.lsk.co.uk, cphilpot@lsk.co.uk - Plenty of activity.

James Steggles, FRICS, Norwich, Stackyard Estates Ltd, james@flintuk.com - Continuing strong demand.

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

Kevin Burt-Gray, MRICS, Cambridge, Pocock & Shae, kevin@pocock.co.uk - Christmas slowdown and Brexit uncertainty here too. Rental market generally busier than last year though and might be a reflection of some potential buyers choosing to rent in order to monitor the sales market or await Brexit outcome before purchasing.

Surveyor comments - lettings

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - Good demand for well-presented properties.

Richard Bannister, MRICS, Felixstowe, Bannisters, 01394 276828, www.bannisterco.com, rwb@bannisterco.com - The lettings market in this area seems unaffected by ongoing Brexit issues.

South East

Anthony E Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Landlords extra purchasing costs at outset precluding buy to let sales.

David Boyden, MRICS, Colchester Head Office, Boydens, 01206 762244, www.boydens.co.uk, david.boyden@boydens.co.uk - Half of the lets that were achieved throughout November have been a result of new instructions. We have seen a sharp reduction in the number of viewings taking place, however the number of lets achieved is only slightly less than that compared to October.

David Parish, FRICS, Upminster, Gates Parish & Co, 01708 250033 - The lettings market is fairly brisk but rental levels achieved remain static. Good quality properties continue to attract interest despite the time of year.

Edward Seymour, MRICS, Lewes, Strutt & Parker, 01273 407014 - Market has slowed as expected for the time of year although we continue to receive high levels of interest where properties are competitively priced.

Hannah Ward, Hove, King and Chasemore, hannah.ward@countrywide.co.uk - It is a very price-sensitive market. It's a tenant market. They have so much choice and are being very picky. There is no urgency to move.

Howard Mecklenburgh, MRICS, Watford, LP&M, howard@lpandm.co.uk - Expected oversupply (due to current planning decisions) of 1 and 2 bedroom flats.

Ian Perry, FRICS, Faringdon Fairford Lechlade Highworth Witney, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - Market is still strong.

James Farrance, FARLA, MNAEA, Maidenhead, WD Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Demand from tenants remains steady.

John Frost, MRICS, Amersham, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Good activity so Brexit has not affected the rental sector.

John Frost, MRICS, Gerrards Cross, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - No investment buyers - low instructions.

John Frost, MRICS, Slough, The Frost Partnership, 01494 680909, frostweb.co.uk, beaconsfield@frostsurveyors.co.uk - Tax measures imposed on landlords and general feeling from them that they are targeted.

Keith Fox, FRICS, Eastbourne / Brighton, Keith Fox Surveyors, 01323489116, keithfox10@gmail.com - Availability of accommodation.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - We are seeing an increase in higher rental value properties coming to the market probably due to the difficult sales market for such properties.

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

Richard Barber, AssocRICS, North Bucks Milton Keynes Northampton and Bedford, Allcott LLP, 07787240246, richard@allenbarber.co.uk - Lettings remain strong except in the executive larger home market where demand is lower.

Stuart Gray, MRICS FAAV, St Albans, Strutt & Parker, 01727 738280, www.struttandparker.com, stuart.gray@struttandparker.com - The market for larger rental properties continues to be sluggish even before the seasonal slowdown.

South West

Ian Perry, FRICS, Cheltenham Cirencester Nailsworth Stroud tetbury, Perry Bishop and Chambers, 01285 655355, perrybishop.co.uk, ianperry@perrybishop.co.uk - The market is as good as ever.

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - Demand is ticking over and rentals are stable although rental instructions have slowed a little.

Mark Lewis, FRICS, Dorset, Symonds & Sampson, mlewis@symondsandsampson.co.uk - Awaiting the pre- and post-relationship breakdowns so we are targeting 2 bedroom properties to rent as we expect strong demand.

Matthew Harvey, MRICS, Bourton-on-the-Water, Tayler & Fletcher, 01451 820913, taylerandfletcher.co.uk, matthew.harvey@taylerandfletcher.co.uk - Lack of supply still the key but market very price sensitive.

Nick Cragg, FRICS, Chipping Sodbury, Country Property, 01454 321339, countryproperty.co.uk, nickcragg@countryproperty.co.uk - Not so badly affected as the Sales market because there is a transient population with job moves, changes in circumstances and landlords withdrawing from the lettings market due to political pressures.

Paul Oughton, MARLA, MNAEA, Cirencester and the Cotswolds, Moore Allen & Innocent, 01285 648 118, www.mooreallen.co.uk, paul.oughton@mooreallen.co.uk - Supply supported from existing landlords (fewer new ones) but tenant demand slipping due to higher rents.

Roderick Thomas, FRICS, Wells, Rodrick Thomas, 01749 670079, www.roderickthomas.co.uk, rdt@roderickthomas.co.uk - Caution.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - Tenant demand remains strong and there is a healthy market in the area. The tenant fee ban will undoubtedly increase rents next year.

Wales

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Rentals activity is steady but not as busy as in former years at this time.

Paul Lucas, FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Demand for decent lettings remains stable.

London

Ben Temple, MRICS, London, Regent Property, 02087439101, www.regent-property.com, ben@regent-property.com - The summer was extremely busy with rents rising. We are now heading towards Christmas when the market always gets quieter.

J.J.King, FRICS, Wimbledon, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - The number of letting enquires has exceeded expectations, creating a greater number of lettings in this quarter than in previous years.

J.J.King, FRICS, Merton, Andrew Scott Robertson, 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - With much uncertainty over house prices, letting registrations have increased month on month. This trend shows no signs of abating.

Surveyor comments - lettings

James Gubbins, MRICS, Pimlico, Dauntons, 020 78348000, www.dauntons.co.uk, mail@dauntons.co.uk - Very limited property available to let. Tenants are finding it hard to secure property. More landlords considering selling which will exacerbate the problem.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - November proved busier than expected as some prospective purchasers, nervous about possible price falls, turned to lettings. Plenty of available stock, especially 1 & 2 bed flats, means rents remain soft. Demand has started to slow towards Christmas.

Mr Barinder Bhalla, MRICS, DipHI, CEA, Hounslow (West London Specialist), Acrewoods Chartered Surveyors, 02085775733, www.acrewoods.com, enquiries@acrewoods.com - Letting market active. Rents falling as with demand for old converted flats. Tenants prefer to rent modern purpose-built apartments, and will pay more.

Robert Green, MRICS, Belgravia, John D Wood & Co., 020 3369 1343 - Getting a lot quieter the closer we get to Christmas. People now rushing to get in beforehand or taking their time for a 2019 move.

Robert King, Teddington, Jackson-Stops & Staff, 020 8943 9777 - Christmas and Brexit uncertainty.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - High levels of supply continue to be seen across the prime London markets; downward pressure on rents.

Tom Dogger, MRICS, London, B N Investment Ltd, www.bakkenepetune.com, tdogger@bninvestment.co.uk - Long term rental growth seems very likely given the constraints on the sales market.

Will Barnes Yallowley, AssocRICS, Kensington London, LHH Residential, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - Tenants can now find great value in central London.

Scotland

Ian C. McCredie, MRICS, Glasgow area, West/Central Scotland, McCredie Scott, 07768 298868, ianmccredie@mac.com - Wide area in Central Scotland surveyed. Varies from area to area.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, bradburne.co.uk, info@bradburne.co.uk - The demand by tenants continues in politically uncertain times leading to rents increasing above expected levels.

John Brown, FRICS, Edinburgh, John Brown and Company, 07768583919, jb-uk.com, john.brown@jb-uk.com - Less general property availability, tenant market positive, rents are softening given time of year. Investment continues in rental property in good areas. Quality is important.

John Gell, MRICS, Inverness, Simply Let, 01463 718888, www.simplylet.biz, john.gell@simplylet.biz - A buoyant Highland economy and new infrastructure investment is attracting salaried professionals seeking well-presented properties in the right location. Landlords who can service that need are doing well. Buy-to-let investors remain active.

Linda Gove, MRICS, St Andrews Fife, J & E Shepherd, l.gove@shepherd.co.uk - Steady.

Neil Woodhead, FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co - Over-supply of poor quality/located properties and shortage of quality properties. Landlords inclined to sell when tenants vacate.

Roderick Macdonald, FRICS, West Lothian, DM Hall LLP, 01506 490404, roddy.macdonald@dmhall.co.uk - Rental market demand remains strong.

Northern Ireland

Ciara Aiken, Newry, Best Property Services, 028 302 66811 - High volume of enquiries for 3/4 bed detached and semi-detached housing in Newry City.

Gareth Gibson, FRICS, Belfast, Douglas Huston, 02890683711, www.douglashuston.com, gareth@hustonestateagents.com - This is a quiet time of year with limited supply and interest. Normal market conditions in this very cyclical Belfast market.

Kirby O'Connor, AssocRICS, Belfast, GOC Estate Agents, 02890662366, www.gocestateagents.com, kirby@gocestateagents.com - Rental market has been very strong and sustaining strong prices.

Samuel Dickey, MRICS, Belfast, Simon Brien Residential, 02890595555, www.simonbrien.com, sdickey@simonbrien.com - Tenant demand weakens at Christmas.

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Platinum package: POA

Housing market and lettings market data (questions 1-19). This is the complete data set including the bedroom breakdown for questions 6-7 and 17-18.

- RICS supports academia and will supply the full data set on a complementary basis.
- For the list of questions, refer to *Methodology*.
- All packages include the full historical back set, regional breakdown, and, where applicable, the seasonally and not seasonally adjusted data.



Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the valuation, development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to markets and effecting positive change in the built and natural environments.

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