September 2017: UK Residential Market Survey

Activity indicators remain subdued in September

- Buyer enquiries and sales both fall noticeably over the month
- National price balance still marginally positive but London and the South East return weaker readings
- Expectations point to a subdued near term outlook for both prices and sales

The September 2017 RICS UK Residential Market Survey results are again symptomatic of a market lacking momentum at the national level. The headline indicators on demand and sales both slipped deeper into negative territory, with this subdued picture anticipated to persist over the coming months. Feedback from contributors suggests the recent shift in interest rate expectations may be contributing to the more cautious tone in market sentiment.

The headline price net balance held steady in September, again returning a figure of +6%. As such, this measure is consistent with a very marginal increase in prices nationally. When disaggregated, the price gauge for London remains firmly negative, while the price balance was also negative in the South East for a fourth consecutive month (albeit to a lesser extent than in the capital). Both of these regions continue to display the highest proportion of respondents viewing the market to be overpriced, compared to all other parts of the UK.

Elsewhere, East Anglia and the North East also posted modestly negative readings for house price inflation. Away from these areas, price growth remains relatively robust across the rest of the UK, with Wales, the North West of England, Scotland and Northern Ireland all seeing prices rise over the period.

In terms of the outlook for house prices, three month expectations are now modestly negative at the national level, with the net balance standing at -8% (down from -2% last time). Particularly cautious sentiment in London, along with the South East, continues to weigh on the headline figure. That said, Northern Ireland and Scotland are now the only two areas in which contributors are confident that prices will rise meaningfully over the near term. Nevertheless, further out, at the twelve month horizon, respondents do expect prices to increase in all areas, with London the sole exception. In the capital, twelve month expectations are now more downbeat than at any other point since this series was introduced in 2010.

Focussing on activity, new buyer enquiries declined during September, as a net balance of -20% more respondents noted a fall in demand (as opposed to an increase). Not only does this extend a sequence of negative readings into a sixth month, it also represents the weakest figure since July 2016. Meanwhile, new instructions to sell were more or less stable for the second report running, having declined continuously over the past eighteen months. Consequently, average stock levels on estate agents' books held broadly steady (albeit near record lows), at 43.3.

At the same time, headline agreed sales volumes also fell, returning a net balance of -15%. Again, this was the softest reading since last July (during the aftermath of the EU referendum). When broken down, although London and the South East were at the forefront of the decline once more, weakness in transactions was widespread during September. In fact, only Wales and the South West were cited to have seen an increase over the month, while all other parts of the UK exhibited either a flat or negative trend. Given the sluggish backdrop, the average time taken from listing to completion across the UK lengthened to 18 weeks (from 17), according to the latest results.

Going forward, little change is anticipated in terms of national sales activity over the coming three months, with the expectations series slipping to -1% from +7% previously. Likewise, the twelve month outlook is also flat at the national level, although respondents are a little more optimistic in Wales, Scotland and Northern Ireland.

Looking at the lettings market, interest from prospective tenants edged up during September (non seasonally adjusted), with 10% more respondents noting a rise, rather than a fall, in demand. Landlord instructions declined alongside this, meaning listings have not seen any growth going back fourteen months. Rental expectations are somewhat subdued in the near term, with contributors anticipating only a marginal rise on a UK-wide basis.

Over the next twelve months, respondents are pencilling in a rise of around 2% in rents nationally. Conversely, contributors in London still see rents coming under further downward pressure over the year ahead, although all other parts of the UK display positive projections.

*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:

1. How have average prices changed over the last 3 months? (down/ same/ up)
2. How have new buyer enquiries changed over the last month? (down/ same/ up)
3. How have new vendor instructions changed over the last month? (down/ same/ up)
4. How have agreed sales changed over the last month? (down/ same/ up)
5. How do you expect prices to change over the next 3 months? (down/ same/ up)
6. How do you expect prices to change over the next 12 months? (% band, range options)
7. How do you expect prices to change over the next 5 years? (% band, range options)
8. How do you expect sales to change over the next 3 months? (down/ same/ up)
9. How do you expect sales to change over the next 12 months? (down/ same/ up)
10. Total sales over last 3 months i.e. post contract exchange (level)?
11. Total number of unsold houses on books (level)?
12. Total number of sales branches questions 1 & 2 relate to (level)?
13. How long does the average sales take from listing to completion (weeks)?
14. How has tenant demand changed over the last 3 months? (down/ same/ up)
15. How have landlords instructions changed over the last 3 months? (down/ same/ up)
16. How do you expect rents to change over the next 3 months? (down/ same/ up)
17. How do you expect average rents, in your area, to change over the next 12 months? (% band, range options)
18. What do you expect the average annual growth rate in rents will be over the next 5 years in your area? (% band, range options)
19. 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:

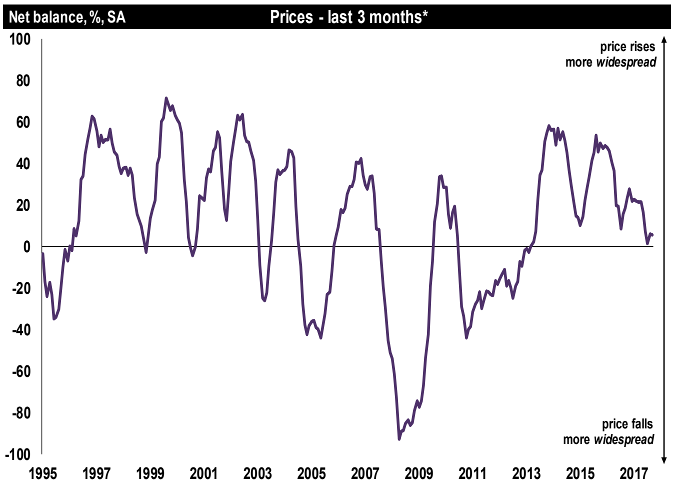
- **October Survey: 9 November**
- **November Survey: 14 December**
- **December Survey: 18 January**

Number of responses to this month's survey:

- This survey sample covers 571 branches coming from 310 responses

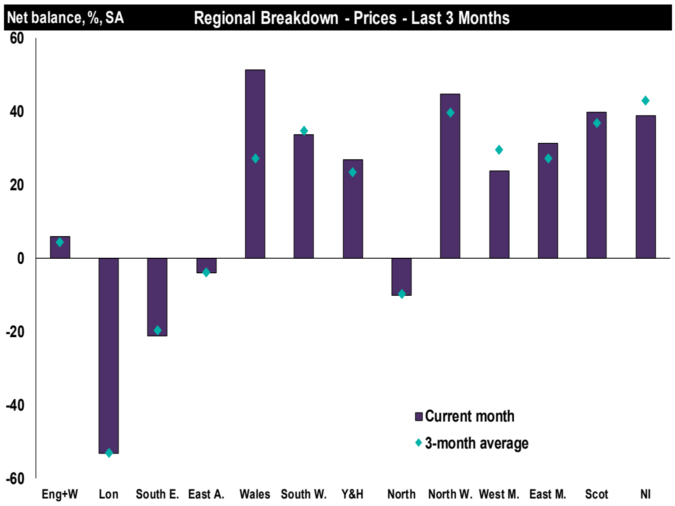
Sales market charts

National Prices - Past three months

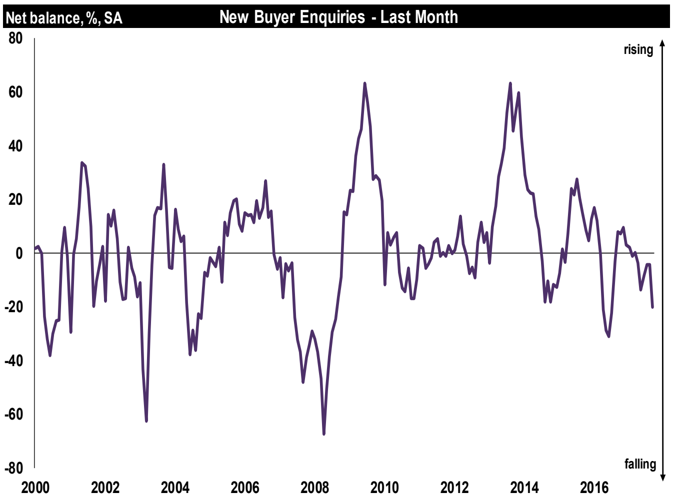


*the net balance measures breadth (how widespread price falls or rises are on balance) rather than depth (the magnitude of price falls or rises).

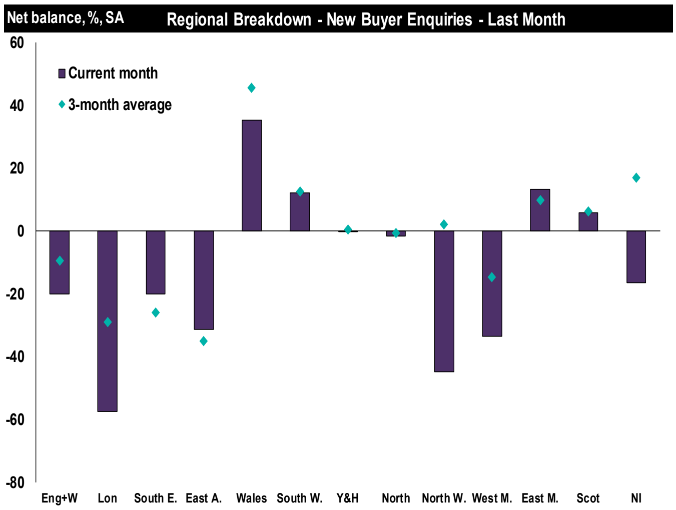
Regional Prices - Past three months



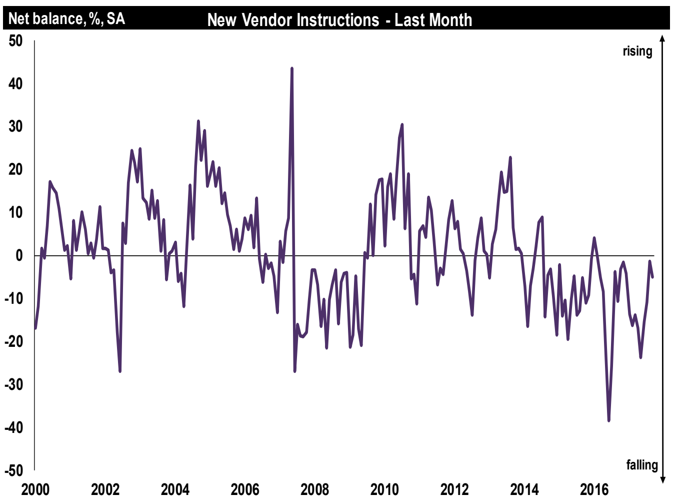
National Enquiries - Past month



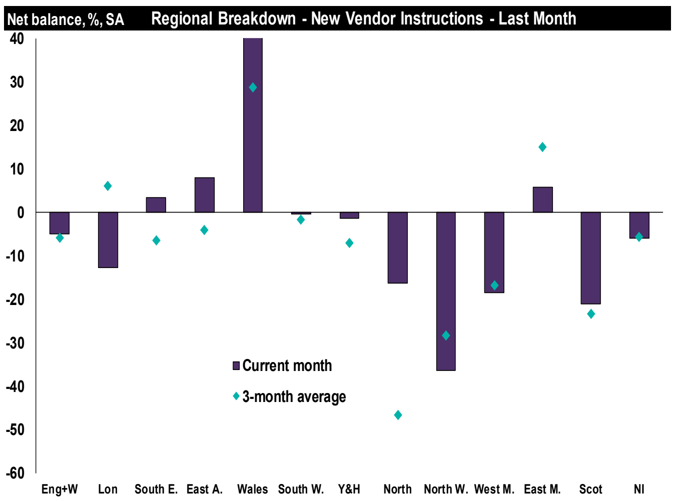
Regional Enquiries - Past month



National New Vendor Instructions - Past month

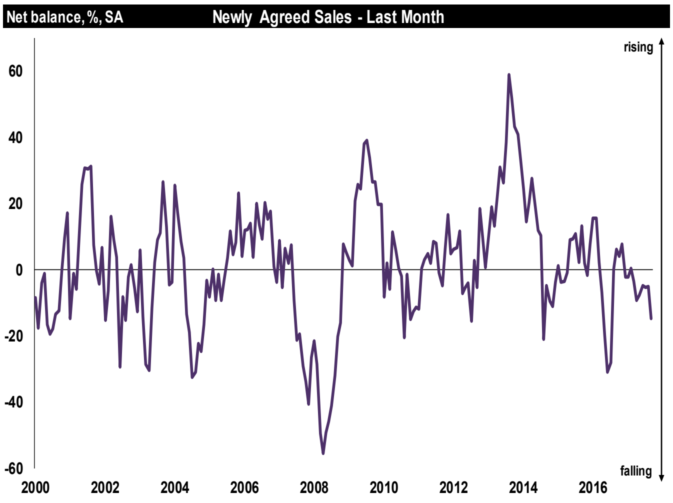


Regional New Vendor Instructions - Past month

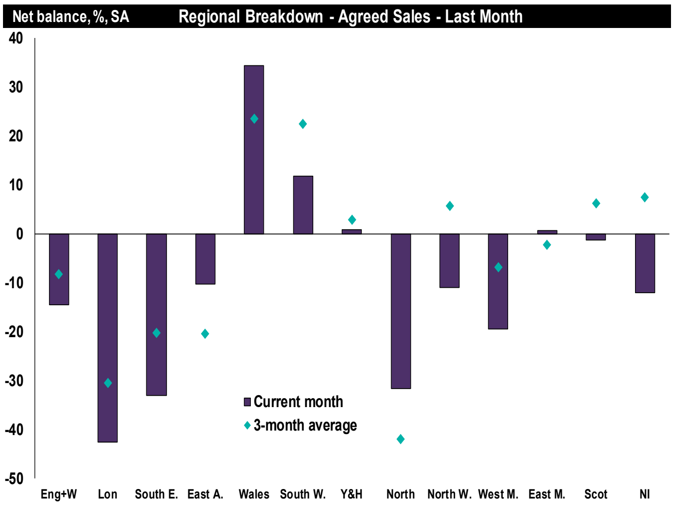


Sales market charts

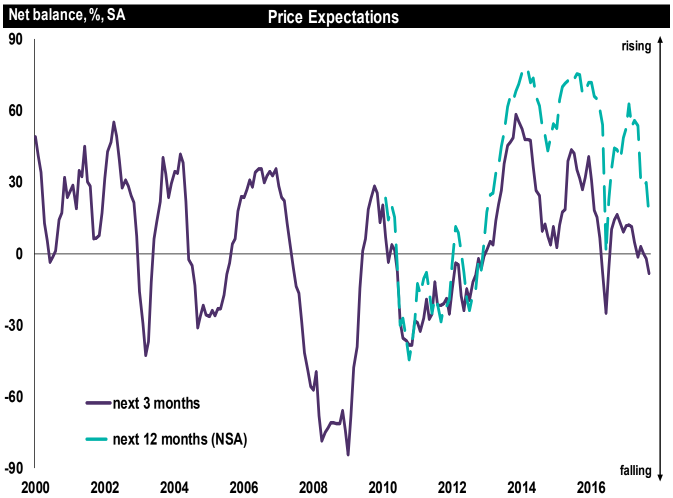
National Newly Agreed Sales - Past month



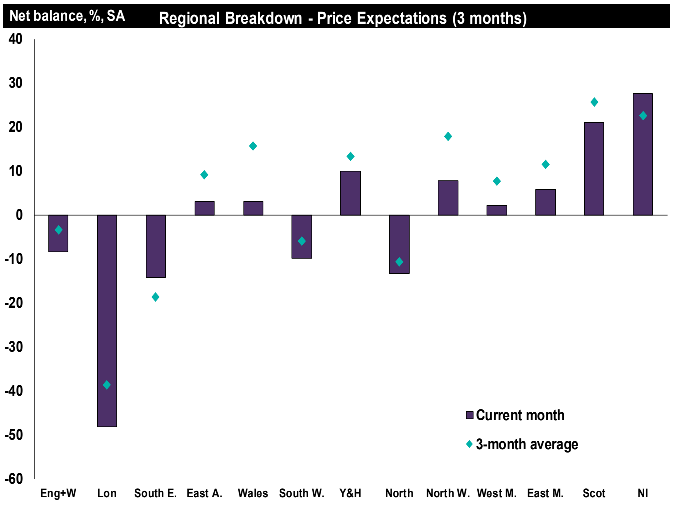
Regional Newly Agreed Sales - Past month



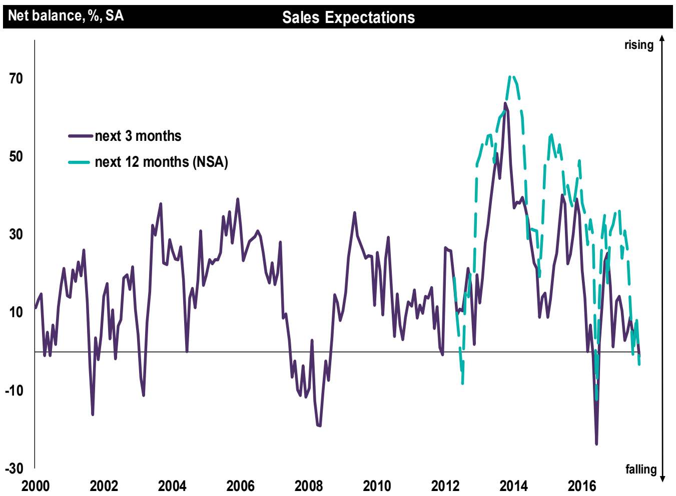
National Price Expectations - Three and twelve month expectations



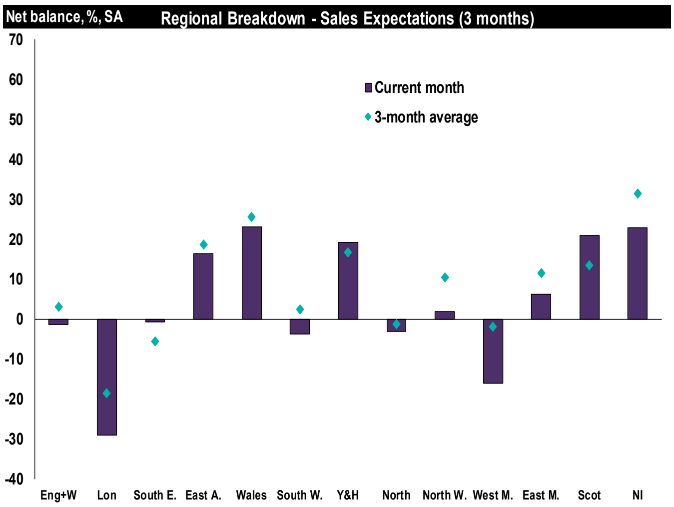
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

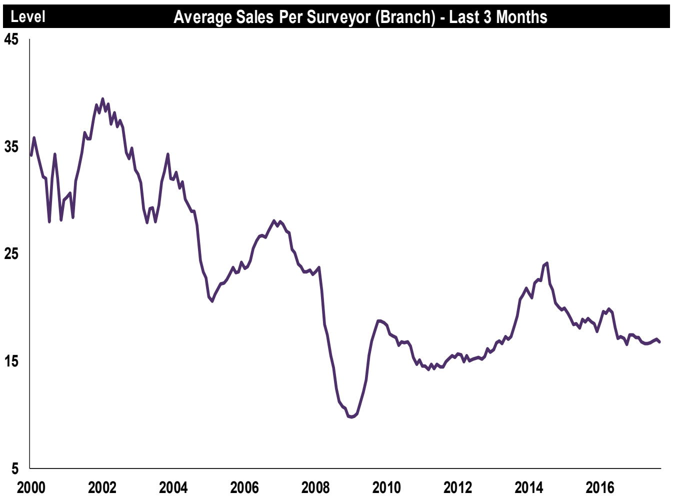


Regional Sales Expectations - Next three months

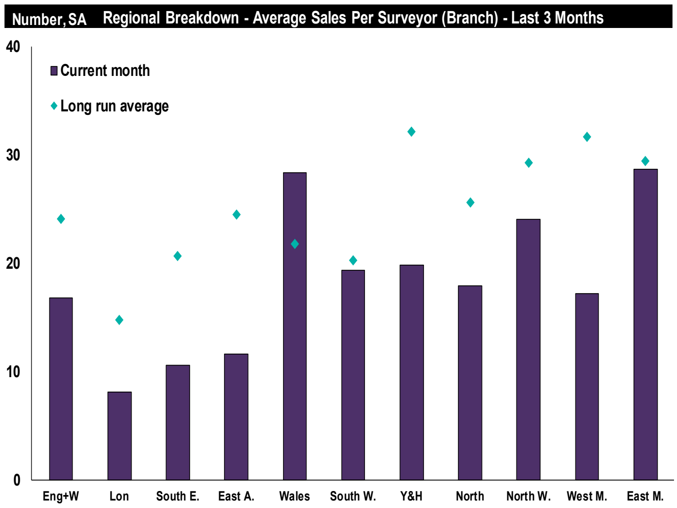


Sales market charts

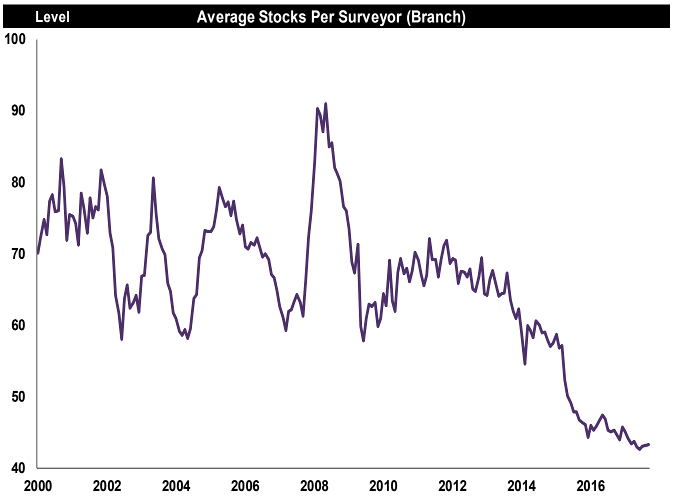
National Average Sales Per Surveyor - Past three months



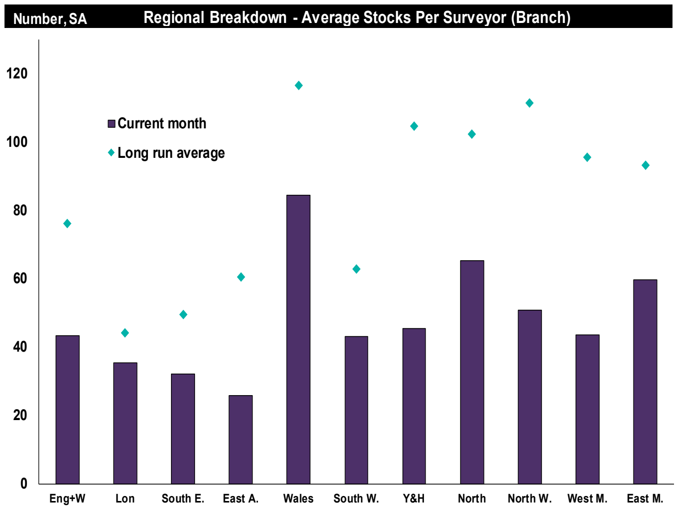
Regional Average Sales Per Surveyor - Past three months



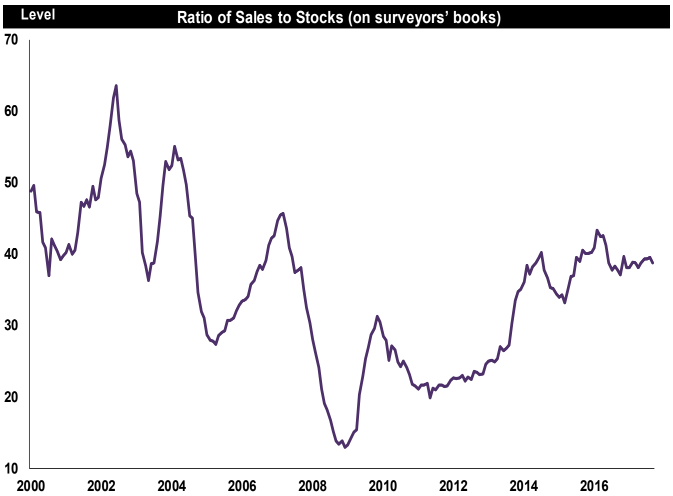
National Average Stocks Per Surveyor



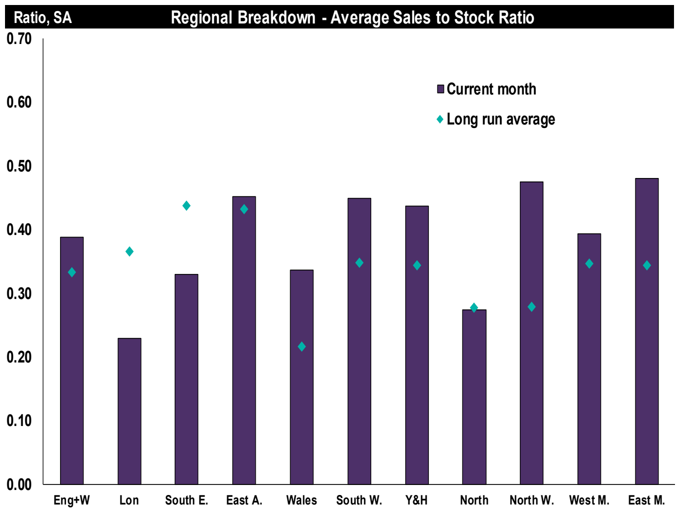
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

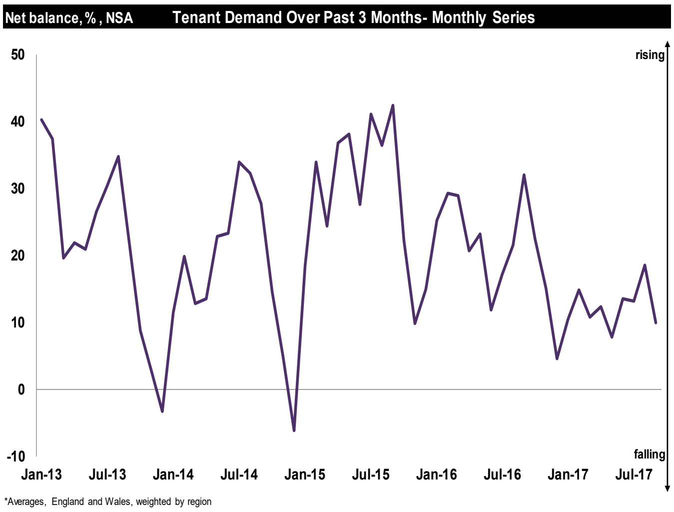


Regional Sales to Stock Ratio

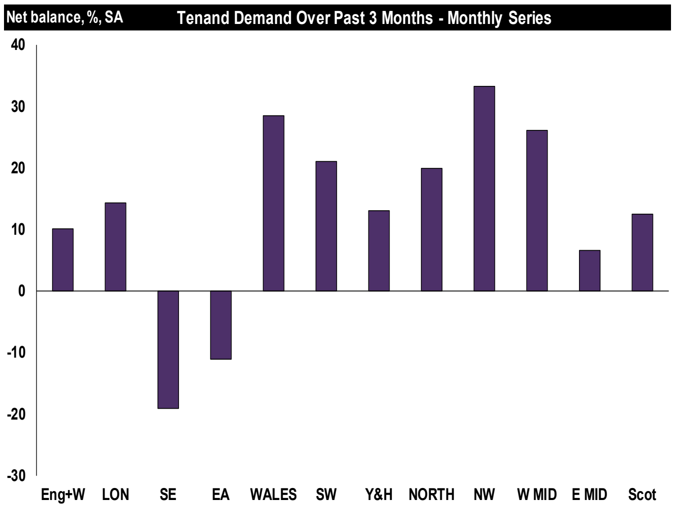


Lettings market charts

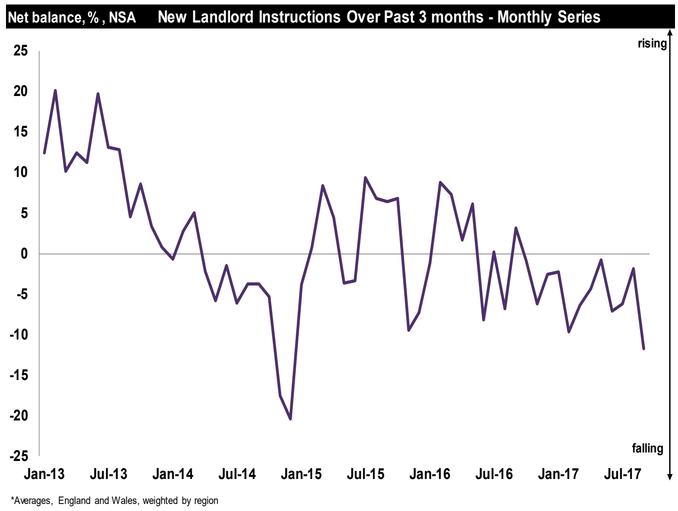
National Tenant Demand - Past three months



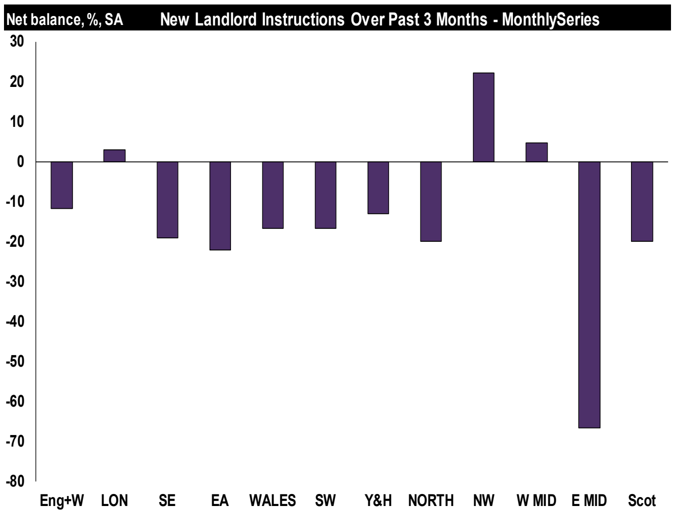
Regional Tenant Demand - Past three months



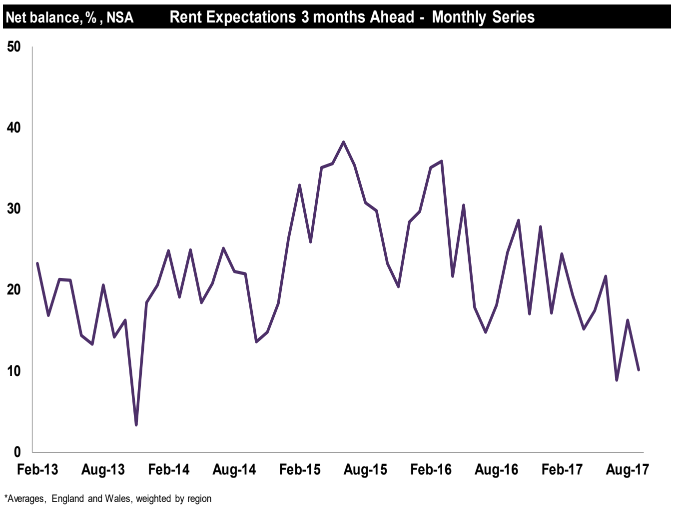
National New Landlord Instructions - Past three months



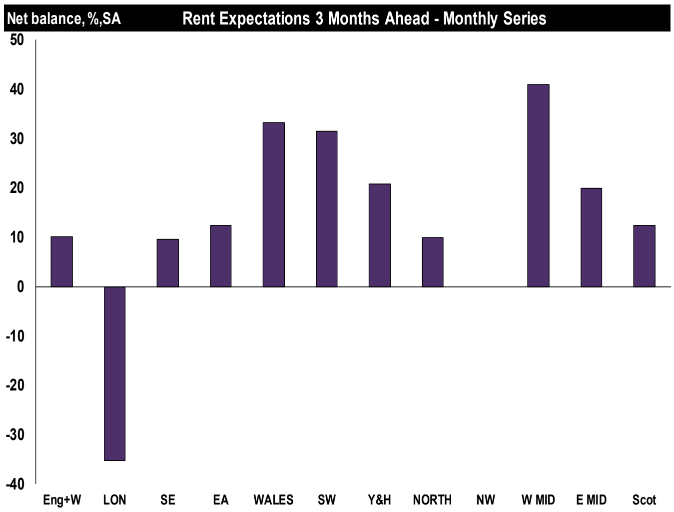
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

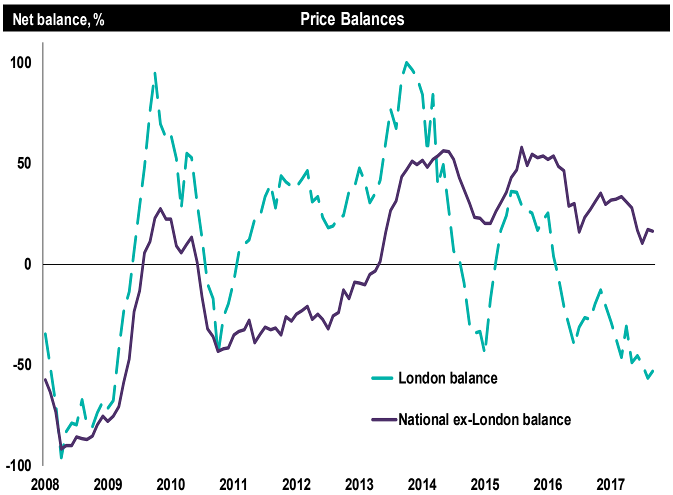


Regional Rent Expectations - Next three months

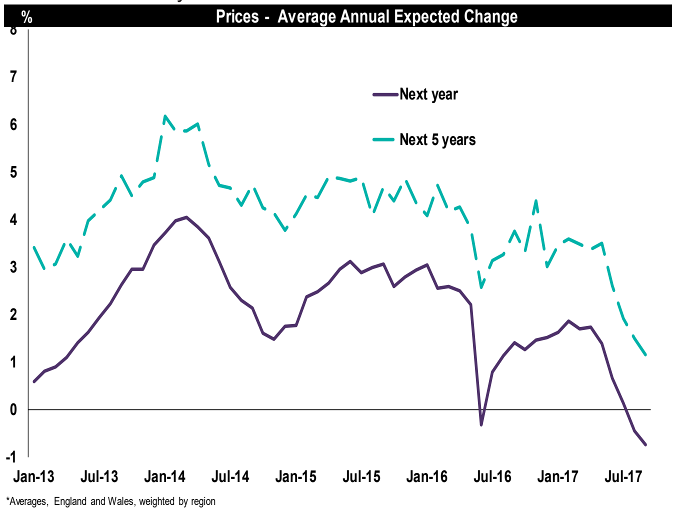


Expectations & other data

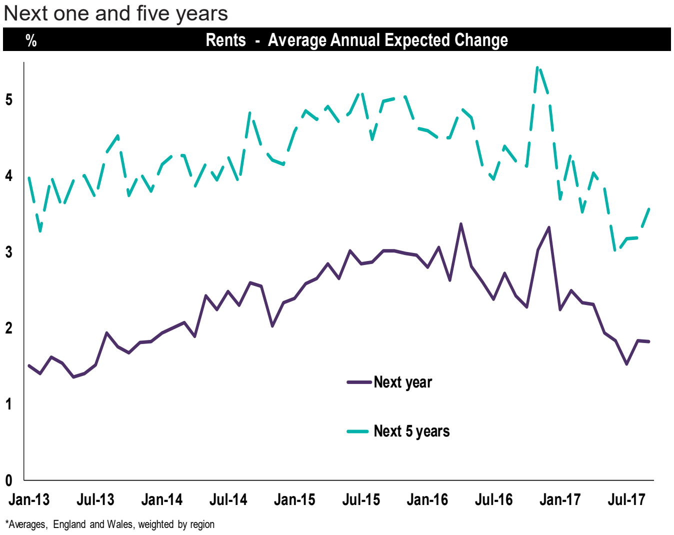
National Price Balance (excluding London) and London Price Balance - Past three months



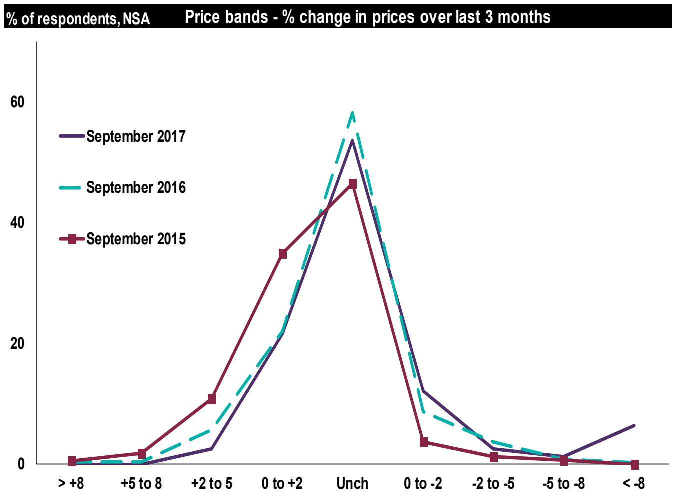
National Average Annual Expected Price Change (point estimate) - Next one and five years



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, BAC (Hons) Dip Surv MRICS, Kendal, Thomson Hayton Winkley Estate Agents, 01539 815700 - Good activity for the start of autumn with a steady stream of new instructions and a similar number of agreed sales - prices are remaining relatively static.

Keith Pattinson, FRICS, Newcastle upon Tyne, Keith Pattinson Ltd, 07770602155, pattinson.co.uk, keith.pattinson@pattinson.co.uk - Increase in stamp duty discourages people from choice moves. It does not affect forced moves, i.e. divorce/splits, job moves, growing family, deceased estates, down-sizing/into care.

Michael Hodgson, MRICS, Sunderland, Michael Hodgson, 0191 5657000, michael@michaelhodgson.co.uk - Lack of supply to the market.

Mr T H Brannen, FRICS, Coastal, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Levels of activity across the board have started to increase.

Neil Foster, BSc (Hons) MRICS, Newcastle upon Tyne, Foster Maddison Property Consultants, neilfoster@fostermaddison.co.uk - Slowly reviving after the seasonal slump during August. No sign of price growth but vendors appear more willing to trade.

Paul McSkimmings, BSc (Hons) MRICS, Newcastle upon Tyne, Edward Watson Associates, 0191 2812444, www.edwardwatson-assoc.com, paul@edwardwatson-assoc.com - Quieter month with fewer enquiries and instructions. Hopefully this is a small blip and not an indicator that the traditional end of year slowdown has started earlier.

Simon Bainbridge, MRICS, Darlington, Savills, 01325 370500, savills.co.uk, sbainbridge@savills.com - Not much sign of a post holiday lift and survey sensitive sales are taking too long to reach exchange.

Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, alex.mcneil@bramleys1.co.uk - The market remains subdued primarily as a result of there being limited new stock becoming available over a sustained period of time. There remains a overall satisfactory underlying demand and there is a feeling that there is a latent demand building.

Bill Dale, MRICS, Ilkley, Dale Eddison, 01943 817642, www.daleeddison.co.uk, bill@daleeddison.co.uk - Strong market conditions over the last quarter. Sales only being held back by a lack of supply of new properties coming to the market.

Chris Clubley, FRICS FAAV, Market Weighton, York, Clubleys, 01430 874000, clubleys.com, mw@clubleys.com - The market remains strong due to a lack of property on the market, values are remaining high and met asking prices. A little uncertainty due to potential interest rate rise and Brexit.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - Reasonably good local market conditions at present.

Ian Adams, MRICS, Kingston upon Hull, Metropolis, ianadams31@yahoo.co.uk - Shortage of stock leading to high activity, however can vary considerably from location to location.

James Brown, MRICS, Richmond, Norman F Brown, 01748822473, normanfbrown.co.uk, belindandjames@hotmail.co.uk - Some improvement in buyer activity this month but still a pretty flat market.

John E Haigh, MRICS FAAV, Knaresborough, Lister Haigh (Knaresborough) Limited, 01423 860322, www.listerhaigh.co.uk, knaresborough@listerhaigh.co.uk - New house sales taking a large proportion of sales, in particular this involves First Time Buyers which will be continuing trend as new build supply increases. Most transactions are not through estate agents.

Kenneth Bird, MRICS, Wetherby, Renton & Parr, 01937 582731, www.rentonandparr.co.uk, ken@rentonandparr.co.uk - The traditional surge in market activity didn't happen this September. Should we be concerned?

M J Hunter, MRICS, Doncaster, Grice and Hunter, 01302 360141, www.gricehunter.co.uk, griceandhunter@btconnect.com - There has been a modest increase in buyer activity, for certain price ranges, but new instructions remain very limited.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000 - The sales market is slowing down despite the end of the summer holiday period.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - Sales and instructions here - unusually for September - have eased downwards this month. There is a feeling that the unsettled political and European situation is slightly adversely unsettling the property market.

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 501211 - High Stamp Duty will depress the high end market.

North West

Derek Coates, MRICS, Liverpool, Venmore, 0151 236 0301, www.venmores.co.uk, d.coates@venmores.co.uk - A quiet month. With much uncertainty regarding interest rate rises, Brexit and the general political climate, vendors appear to be sitting on their hands.

John Halman, FRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460 344, www.gascoignehalman.co.uk, jhalman@gascoignehalman.co.uk - A seasonal slowdown in activity but generally good sales in all but the top end of the market which remain fickle.

East Midlands

Andrew W York, FRICS, Leicester, Moore & York Ltd, 0116 2558666, mooreandyork.co.uk, andrew.york@mooreandyork.co.uk - Sales market up to £250,000 still very strong but mid-market slowing and top end stalling.

Chris Charlton, FRICS, Nottingham, Savills, 0115 9348020, www.savills.co.uk, ccharlton@savils.com - The market continues to be impacted by a low supply of housing stock. The best new instructions are selling well but the outlook remains mixed.

Christopher Shallice, FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - The market has quietened down considerably.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Instructions remain slow, limited stock. Plenty of interest in new property coming to the market.

David Hawke, FRICS, Worksop, David Hawke & Co, 01909 531450 - This month, general activity has dropped back again. The market is very quiet - disappointing as the previous month. There was some hope for 'a lift'.

Mark Newton, FRICS, Grantham, Newton Fallowell, 01476 591900, www.newtonfallowell.co.uk, mark.newton@newtonfallowell.co.uk - September was a struggle for instructions but sales were up on 2016 by some margin.

Paul Perriam, BSc (Hons) MRICS, Nottingham, William H Brown/Bagshaws Residential, 01332 542299, www.sequencehome.co.uk, paul.perriam@sequencehome.co.uk - Instructions and sales increased in September with good activity in all price ranges.

Surveyor comments - sales

Peter Buckingham, Market Harborough, Andrew Granger & Co, 01858 431315, www.andrewgranger.co.uk, peter.buckingham@andrewgranger.co.uk - Economic and political uncertainty is causing fewer sellers to place their properties for sale. However, demand is still exceeding supply in Market Harborough area, so sales are surprisingly good at present.

Quentin Jackson-Stops, FRICS, Northampton, Jackson-Stops, 01604 632991, www.jackson-stops.co.uk, quentin.jackson-stops@jackson-stops.co.uk - September did not show an autumn bounce as is usual and confidence has ebbed. New instructions are in short supply as are willing and able buyers. Prices are static at best. There is a possibility of a decline in values if interest rates rise.

Steve Gadsby, BSc FRICS, Derby, Gadsby Nichols, 01332 296396, www.gadsbynichols.co.uk, stevegadsby@gadsbynichols.co.uk - Unusually quiet for the time of year after seasonal holiday period. Confidence seems to have dropped due to adverse unqualified media speculation on house price reductions, interest rates, inflation and post Brexit.

Will Ravenhill, MNAEA MARLA, Leicester, Readings, 0116 2227575, www.readingspropertygroup.com, wravenhill@readingspropertygroup.com - For some reason, new listings picked up immensely in August. Sales agreed were strong as well.

West Midlands

Andrew Grant, Worcester, Andrew Grant LLP, 07976982742, dcss@andrew-grant.co.uk - A distinct shortage of supply.

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - September was very steady in all sectors although properties in higher price ranges have proved more of a challenge to sell.

J J Dell, MRICS FAAV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Instructions have picked up but still short supply of properties for buyers, shortage of bungalows.

Jeremy Jehan, Registered Valuer, Hereford, Brightwells, 01432 261325, jeremy.jehan@brightwells.com - Strong demand driven by lack of supply, which we believe will continue for the rest of the year, as traditionally less stock comes to the market. Whilst sales are good, our end of the market has not seen any increase in price over the last quarter.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - Realistically priced new instructions generating good levels of enquiry. Overall an active market despite fewer properties coming for sale. Autumn sales look promising.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - Volume is increasing after summer holiday period. Marketing expected to remain steady up to Christmas. Good demand and shortage of new instructions.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Shortage of new instructions and more properties needed to satisfy demand. With more stock, autumn could be busy.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - Increased activity after summer holiday period. New sale instructions improving although more are needed. No shortage of buyers for realistically priced interesting properties.

John Ozwell, FRICS, Solihull, Hunters, 01564 771000 - Market has gone quiet when it should be busy. Perhaps the many uncertainties economically and politically or just not enough stock to choose from.

Mark Wiggin, MRICS, Ludlow, Strutt and Parker, www.struttandparker.com, mark.wiggin@struttandparker.com - Plenty of buyers, shortage of vendors being reasonable.

Mike Arthan, FRICS, Shropshire, Barbers, m.arthan@barbers-online.co.uk - Not enough new stock coming onto the market to replace recent sales.

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Low stock levels prompting unrealistic asking prices for oradinary stock. Certain price bands very crowded with few applicants. Outlook uncertain. Wise vendors taking sensible offers and moving on.

Ryan Williams, FRICS, Hay on Wye, McCartneys, ryan@mccartneys.co.uk - Fewer properties on the market generally is the only thing underpinning values. Cash buyers driving hard bargains with many vendors keen to move before winter.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - Lack of new instructions and a general churn of properties where sellers are disenchanted with overpricing of properties by an existing Agent and no sale.

East Anglia

Andrew Wagstaff, MRICS, Burnham Market-North Norfolk, Bedfords, andrewwagstaff@bedfords.co.uk - Increase in activity levels post-holiday season. Market remains price sensitive.

David H Knights, MRICS, Ipswich, David Brown & Co, 01473 222266, www.davidbrown-ipswich.co.uk, mail@davidbrown-ipswich.co.uk - Both sales and new instructions are continuing to suffer from a lack of confidence in the economy due to Brexit and the influence of the media and from the effect of high levels of stamp duty. Hope for helpful measures in the autumn statement.

Ian Cook, MRICS Registered Valuer, Norwich, Hupton Cook Limited, ian.cook@huptoncook.co.uk - Economic uncertainty limiting number of properties coming to market and demand from buyers moving into region supporting values.

Jeffrey Hazel, FRICS, Kings Lynn, Geoffrey Collings & Co, 01553 774135 - Strong demand from purchasers but still limited amount of property available.

Mark Wood, MRICS, Cambridge, Carter Jonas, www.carterjonas.co.uk, mark.wood@carterjonas.co.uk - The expected increase in activity that is usual in September didn't materialise, with volume of sales actually down on August. Hopeful it is a 'blip' in the market although media speculation of possible interest rate rises isn't helpful.

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - The lower end to the market continues to show the most activity. At the top end, there are very few buyers and too many sellers and agents with unrealistic expectations.

W J Hartnell, FRICS, Brentwood, Simon Matthew & Co., 01277 355255 - Sales over past 3 months have been slow due to the holiday period. We hope things will pick up this autumn.

South East

Anthony Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Autumn market activity levels down though higher success levels from viewers.

David Nesbit, FRICS, Portsmouth, D.M.Nesbit & Company, 02392 864321, www.nesbits.co.uk, davidnesbit@nesbits.co.uk - Some movement following holidays, but the market is drifting. Increases in mortgage rates will affect confidence.

David Parish, FRICS, Upminster, Gates Parish & Co, 01708 250033 - The market remains steady - however rents remain static and are likely to remain so.

Surveyor comments - sales

Edward Rook, MRICS, Sevenoaks, Knight frank, edward.rook@knightfrank.com - Stamp duty stalling the market.

Ian Perry, FRICS, Fairford Faringdon Lechlade Highworth Witney, Perry Bishop and Chambers, 01285 655355, PerryBishop, ianperry@perrybishop.co.uk - The market is picking up after the Summer, as usual.

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Buyer registrations are up month on month. Correctly priced property is selling well.

Mark Everett, FRICS, Epsom, Michael Everett & Company, www.michael-everett.co.uk, markeverett@michael-everett.co.uk - The anticipated seasonal pick-up is still awaited. A few more instructions and a little more buyer enthusiasm, but nothing like we had hoped for or expected. We could do with some positive news to kick start the market.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - We have seen the return of the post summer bump with more enquirers resulting in properties that had little interest over the summer going under offer.

Michael Brooker, FRICS, Crowborough, Michael Brooker Estate Agents, 01892 663377 - No autumn “bounce”. Households stretched. Brexit concerns lack of confidence.

MJS, AssocRICS, Dover, Matthew Smith Surveying, 07790013904, mjsmithltd@hotmail.co.uk - Property prices seem uncorrelated to the wages available locally suggesting that the market is dependent upon buyers from outside of the area.

Philip Hiatt, MRICS, East Grinstead, Your Move Philip Hiatt, 01342 321142, your-move.co.uk/eastgrinstead, philip.hiatt@your-move.co.uk - No sign so far of a post-holiday season uplift in activity. Our available stock is the highest it has been all year and sales are hard won at the moment.

Tim Green, MRICS, South Oxfordshire, Green & Co., 01235 763562, www.greenand.co.uk, tim.green@greenand.co.uk - The September market has not arrived as hoped and shortage of new instructions and incomplete chains put further strain on otherwise willing home-movers.

Anon, FRICS, South Devon - Banks closing branches, B&Q closed and Toys R US plus others about to which is causing more repossessions and a drag on the market and prices. People are frantically mortgaging to clear car finance etc and are nervous about the next bank crisis/recession.

South West

Christopher Bailey, MRICS, Exeter, Knight Frank, christopher.bailey@knightfrank.com - The market picked up significantly as the schools went back, across all sectors of the market. It is price sensitive but there are enough buyers paying a fair price to ensure the market is very much alive.

David Lewis, BSc Hons, West Devon and East Cornwall, Stags, 01752 223933, www.stags.co.uk, d.lewis@stags.co.uk - There is no end in sight to the lack of liquidity within the market place, driven by lack of stock. Potential sellers will not market their homes because there is little for them to buy. Lenders turning the tap on would help.

David McKillop, FRICS, Salisbury, McKillop and Gregory, dm@mckillopandgregory.co.uk - A very slow start to the month, but it has ended well with sales well up on last year. Real shortage of new stock coming on which is a real headache. Prices being held up artificially in my opinion.

David Robinson, AssocRICS, North Cornwall, Stags, 01566 774999, d.robinson@stags.co.uk - Damp Autumn weather, imminent interest rate rise and geo political events combine for subdued marketplace.

Fiona Forsyth, MRICS, Blandford Forum, Goadsby, 01258 489049, www.goadsby.com, fiona.forsyth@goadsby.com - The market is usually very busy after the summer holidays but it has not kick started this year which is a concern in the run up to Christmas.

G C Thorne, FRICS, East Dorset, Thornes/Fisk, 01202-684004, www.thornes.org.uk, Graham@thornes.org.uk - The market has improved over the last month from a low level following the election result. There is a continuing shortage of stock.

Ian Perry, FRICS, Cheltenham Cirencester Nailsworth Stroud Tetbury, Perry Bishop and Chambers, 01285 655355, PerryBishop, ianperry@perrybishop.co.uk - As usual there is an increase in business following the Summer.

James McKillop, MRICS, South West, Knight Frank, james.mckillop@knightfrank.com - In the prime country market, sales are taking place for properties with land, with sensible guide prices. SDLT continues to be a crucial factor in the decision to buy or not.

James Wilson, MRICS, Shaftesbury, Jackson - Stops, 01747 850858, jackson-stops.co.uk, james.wilson@jackson-stops.co.uk - New instructions, sensibly priced, are generating strong interest.

Jeff Cole, MRICS, Wadebridge, Cole Rayment & White, 01208813595, www.crw.co.uk, jeff.cole@crw.co.uk - We were expecting September to be busier & there seems to have been a definite “cooling off” in the market. Stock levels are still low & some vendors are now reducing their asking prices to try & secure a buyer before Christmas.

Jeremy Priestley, FRICS, Poole, Berkeleys, jeremy.priestley@yougroup.co.uk - Although applicant registrations are slightly ‘up’, there is a general sense of lacking in commitment; infected by government drift and concern over future interest rates, as well as SDLT.

John Corbn, FRICS FCABE, Swanage, Corbens, 01929 422284, corbens.co.uk, john@corbens.co.uk - A good number of new instructions and sales achieved, signs of nervousness with continuing political uncertainty and potential mortgage increases.

Lloyd Smale, FRICS, RICS Registered Valuer, Exeter, Drew Pearce 1748 Ltd, 01392 201748, drewpearce.co.uk, lms@drewprearce.co.uk - Good level of enquiries through the summer and most recent instructions quickly under offer in the sub £400,000 market.

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - We have sold lots of houses over the last few months meaning it has been unusually busy! We suspect this is largely due to supply and demand. Now it will be interesting to see how many properties come to the market to build up our stock.

Mark Lewis, FRICS, Sturminster Newton, Symonds & Sampson, mlewis@symondsandsampson.co.uk - A few chains have broken down because of the buyers at the bottom pulling out. There is rarely a trend as reasons include: falling out of love with their partner, job move or security, deposit promised by parents withdrawn or spooked by the Brexit.

Michael Dukes, MRICS, Taunton, Greenslade Taylor Hunt, 01823277121, www.gth.net, michael.dukes@gth.net - The market has undoubtedly become quieter which seems odd after a busier Summer than anticipated - it is gaining an unwelcome feel.

Surveyor comments - sales

Peter Symons, FRICS, Totnes, Stags, www.stags.co.uk, p.symons@stags.co.uk - Demand remains strong and at last we are seeing the number of properties coming available rising.

Robert Cooney, FRICS, Taunton, Robert Cooney Chartered Surveyors & Estate Agents, 01823 230230, robertcooney.co.uk, robert.cooney@robertcooney.co.uk - Sales taking forever to exchange with many onward buyers unable to secure onward purchases due lack of stock.

Roger Punch, FRICS, South Devon, Marchand Petit, 01752 873311, www.marchandpetit.co.uk, roger.punch@marchandpetit.co.uk - September has seen a real "engagement" of both sellers and buyers, although the risk-averse attitude of both lenders and conveyancers is slowing the market down.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - September was twice as good for new sales than the equivalent month last year. As ever, getting deals over the line seems painful with poor solicitors and online agents in the chain exacerbating delays.

Tom Pether, Dorchester, Jackson-Stops & Staff, 07970 872974 - Brexit, hung parliament, history of over pricing in the area, inflated expectations, the feeling that the SW is exempt from national trends.

Wales

Andrew Morgan, FRICS FAAV, Lampeter, Morgan & Davies, lampeter@morgananddavies.co.uk - Certainly remaining positive at present with reducing stock levels.

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Generally busy with new listings, viewings and offers, but a noticeable easing off, of a rush to buy. More mortgage choices coming to the market and viewers taking more time to make decisions.

David James, FRICS, Brecon, James Dean, 01874 624757, jamesdean.co.uk, david@jamesdean.co.uk - Another busy month with an increase in sales at the upper end of the market. This has led to a smaller stock of properties to sell.

John Caines, MRICS, Bridgend Port talbot Neath, Payton Jewell Caines, 01656654328, www.pjchomes.co.uk, john.caines@pjchomes.co.uk - Following a very busy few months, there are signs that the market is slowing marginally. Supply remains a problem.

Paul Lucas, FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - Pembrokeshire experienced significant activity in property sales during the Spring and Summer months. This activity is beginning to slow down as we approach the winter period.

London

Allan Fuller, FRICS, Putney Sw152TX, Allan Fuller Estate Agents, 02087888822, www.allanfuller.co.uk, allan@allanfuller.co.uk - Buyers are cautious, Brexit and a government with little apparent direction are major factors that especially affect London sales, media predictions of values dropping erodes confidence in buyers.

Alun Jones, MRICS, Knightsbridge, Marler & Marler, 020 7235 9641 - The prime central London market remains in the doldrums. There does seem however to be a slight acknowledgement of this prompting, some realism in asking prices.

Christopher Ames, MRICS Registered Valuer no 1124182, Belgravia /London SW1, Ames Belgravia Ltd, 020 7730 1155, amesbelgravia.co.uk, ca@amesbelgravia.co.uk - The owner/occupier segment of the market is the strongest. Those up-sizing/downsizing at the same time are keen to move by year's end and the price (within reason!) is less important than the timing. They will not wait 2 years for Brexit.

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 000, www.dauntons.co.uk, mail@dauntons.co.uk - The market remained soft throughout the summer period and buyers are concerned that prices are now in decline.

James Perris, MRICS, London, De Villiers Chartered Surveyors, 02078876009, www.devilliers-surveyors.co.uk, james.perris@devilliers-surveyors.co.uk - Government's new taxes are suffocating upper tiers of the market & are now increasingly affecting the buy to let sector. Agents have reported a slight increase in September transactions but generally only when pricing has reflected market activity.

Jamie Dore, Epsom, Gascoigne-pees, 01372743911, www.gpees.com, jamie.dore@gpees.co.uk - Buyers are taking a more cautious approach with less urgency to commit to buying, sellers expectations are still very high.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Sadly, the expected September 'bounce' didn't materialise for us after a quiet summer. Nevertheless, we are finding there are still deals to be done by realistic buyers and sellers - albeit at still softening prices despite fragile market confidence.

John J.King, FRICS, L.B.Merton, Andrew Scott Robertson , 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Middle market family houses between £900-£1.5m remain the most popular. Viewing figures are constant but extracting offers remains key as buyers now see their position as being firmly in the driving seat.

John J.King, FRICS, Wimbledon, Andrew Scott Robertson , 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Reductions in house prices has helped produce a steady number of additional enquirers and sales with limited success.

Josh Homans, MRICS, East London, Valunation, Joshua.homans@valunation.com - Good quality stock now selling for 5-10% less and inferior stock down 15-20%.

Michael Fiddes, MRICS, London, Strutt & Parker, 020 7629 7282, struttandparker.com, annabel.clery@struttandparker.com - Top end of the market has been difficult. This is filtering down into our 'core' (£750k to £1.5m). People definitely spooked.

Peter Tym, FRICS, London, ESV, 02085676817, tymtym@gmail.com - Quiet period between summer vacation and Christmas.

Robert King, Richmond, Jackson-Stops & Staff, 020 8943 9777 - Uncertainty in the market place.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - Prices across prime London continue to soften, perhaps down 1 to 2 % over the last 3 months. Price falls have been greatest in central London at the top end of the market, probably back close to 2012 levels.

Surveyor comments - sales

Scotland

Alex Inglis, MRICS, Scottish Borders, Galbraith, 01573 224 244, galbraithgroup.com, alex.inglis@galbraithgroup.com - Reduced numbers of properties coming on to the market, possibly due to economic uncertainty; appears to favour sellers.

Chris Highton, FRICS, Edinburgh, Allied Surveyors Scotland, 0131 226 6518, www.alliedscotland.com, chris.highton@alliedsurveyorsscotland.com - There is still a lack of supply in the Edinburgh market, resulting in sales in buoyant areas often significantly above Home Report value. The top end remains difficult, due to the prohibitively high level of LBTT.

Graham Tonner MRICS, MRICS, Dundee, Graham + Sibbald, 01382200064, www.g-s.co.uk, gtonner@g-s.co.uk - Sale prices achieved continue to improve. Lack of properties coming to the market is an issue.

Greg Davidson, MRICS, Perth, Graham + Sibbald, 01738 445733, www.g-s.co.uk, gdavidson@g-s.co.uk - Some sectors are performing well but LBTT continues to stifle the prime country markets where the tax costs are disproportionate.

H Lukas, MRICS, Scottish Borders, Galbraith, 01896754842, www.galbraithgroup.com, harry.lukas@galbraithgroup.com – Steady, thin market.

Ian Fergusson, BSc FRICS, Stirling, J&E Shepherd, 01786450438, www.shepherd.co.uk, ian.fergusson@shepherd.co.uk - Lack of supply holding back the market, and keeping prices up. LBTT at higher bands having an adverse effect.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, www.bradburne.co.uk, ian@bradburne.co.uk - The sales market has slowed significantly compared to the traditional autumn market. There is a lack of confidence from sellers to enter the market and buyers to offer on available stocks.

James Burns, MRICS, Inverness, Grham + Sibbald, 01463 236977, www.g-s.co.uk, jburns@g-s.co.uk - LBTT is still impacting the upper end of the market which is leading to protracted sales periods and reduced sale prices.

john brown, FRICS, Edinburgh, JOHN BROWN and COMPANY, 07768583919, jb-uk.com, john.brown@jb-uk.com - Activity for properties up to 325k is very good, less good above 500k when LBTT becomes a real cost, and above 800k very slow- reality is the top end is slow because of LBTT and Brexit-added to the Inderef 2 equation still in the calculation. Employment is key.

Kevin Hay, MRICS, Ayr, Allied Surveyors, 01292 265381 - Sales are still good although there is a lack of supply of new housing stock.

Kevin MacDonald, MRICS, Inverness, Graham + Sibbald, 01463 236977, www.g-s.co.uk, kevin.macdonald@g-s.co.uk - Activity is unremitting in both the new home and second hand market with prices consolidating in response. Amid talk of possible interest rate changes, stability and security will remain key factors to maintain an active market through the Winter.

Marion Currie, AssocRICS, RICS Registered Valuer, Dumfries & Galloway, Galbraith, 01556 505346, www.galbraithgroup.com, marion.currie@galbraithgroup.com - Enquiries are tailing off now from buyers, market appraisals/new instructins are also thinning, but this is normal not politically driven. D & G should still see some activity into October though.

Peter McEachran, MRICS, Renfrewshire, Graham and Sibbald, 0141 889 3251, www.g-s.co.uk, peter.mceachran@g-s.co.uk - After a lull in the summer the market is improving. There is good demand but not enough houses coming to the market. Closing dates becoming a feature.

Richard A Clowes, MRICS, Scottish Borders, DM Hall LLP, 01896 752009, www.dmhall.co.uk, richard.clowes@dmhall.co.uk - Still signs of good activity in the marketplace with more sales being agreed. Lack of new instructions and fresh stock seems to be a complaint at present from local agents.

Scott Holley, Student, Perthshire, Galbraith, scott.holley@galbraithgroup.com - Market Appraisals have increased since the schools returned from holidays, new instructions are starting to increase, buoyant 2-3 bedroom house market, larger family home market is slow and buyers are in no rush with decision making.

Thomas Baird, MRICS, Glasgow, Select Surveyors Ltd, 0141 632 6589, www.selectsurveyors.co.uk, reception@selectsurveyors.co.uk - A slow down over the September period noticed for home report instructions. Indications from local agents suggest that the lack of new stock is unlikely to change much as we approach the festive period.

Tom Murray, AssocRICS and RICS Registered Valuer, Girvan, South Ayrshire, Galloway and Ayrshire Properties, 01465 713498, www.gapinthemarket.com, tom.murray@gapinthemarket.com - September saw a strong level of sale instructions and good demand. This steady flow in new instructions generates interest and keeps applicant enquires at levels we have not experienced for a long time.

Northern Ireland

Daniel Mc Lernon, FRICS, Omagh, Co. Tyrone., Mc Lernon Estate Agents & Valuers, 02882 242772, www.mclernonestateagents.com, info@mclernonestateagents.com - Sales have slowed down primarily due to the lack of housing stock for first time buyers.

Harry Clarke, FRICS, Ballymena, Harry Clarke & Co, 028 256 48829 - Listings reducing across the board, lack of stock is becoming a problem.

Kirby O'Connor, Assoc Rics, Belfast, GOC Estate Agents Ltd, 02890662366, gocestateagents.com, kirby@gocestateagents.com - The sales market is much stronger than last year but we are finding contracts taking longer for signature.

Terry Finlay, MRICS, Enniskillen, Montgomery Finlay & Co., 02866324485, www.montgomeryfinlay.com, montgomeryfinlayandco@hotmail.com - Brexit and economic stability are a worry.

Surveyor comments - lettings

North

Keith Pattinson, FRICS, Newcastle upon Tyne, Keith Pattinson Ltd, 07770602155, pattinson.co.uk, keith.pattinson@pattinson.co.uk - Many older landlords selling, as no longer need income and prefer to spend capital, even giving to family etc

Mr T H Brannen, FRICS, Coastal, Brannen & Partners, 0191 2517878, www.brannen-partners.co.uk, shaun.brannen@brannen-partners.co.uk - Shortage of family homes.

Neil Foster, BSc (Hons) MRICS, Newcastle upon Tyne, Foster Maddison Property Consultants, neilfoster@fostermaddison.co.uk - Storm clouds gather as landlords exit and tenants begin to feel the squeeze.

Richard Towler, MRICS, Penrith, Eden Lettings & Management, enquiries@edenletting.co.uk - A reduction in the number of applicants, perceived to be the result of the loss of European candidates following the Brexit vote, has altered the supply/demand equation, causing an increase in the number of failed lettings. Future remains uncertain.

Yorkshire and Humberside

Alex McNeil, MRICS, Huddersfield, Bramleys, alex.mcneil@bramleys1.co.uk - Continuing strong demand for good quality accommodation in most areas available to the rented sector. Rents continuing to rise this year and likely to continue over next 12-18 months.

Chris Clubley, FRICS FAAV, Market Weighton, York, Clubleys, 01430 874000, clubleys.com, mw@clubleys.com - The lettings market continues to be strong, however, expectations from landlords settled down due to houses sticking on the market if overvalued.

David J Martindale, MRICS, Wakefield, FSL, david.martindale@fslea.com - Lettings continue to be very busy.

Ian Adams, MRICS, Kingston upon Hull, Metropolis, ianadams31@yahoo.co.uk - Landlords still buying HMO's in large numbers seeing a change in the types of lets now available to migrant workers.

Pete Shield, FRICS, Sheffield, Shield Estates UK Limited, 0114 2571000 - Still a buoyant market with good demand for well-presented properties at realistic rents.

Peter Green, Halifax, Brearley-Greens, 01422 330088 - Lettings which are obviously in a different category than sales do not appear to be so affected and are still quite active.

Simon Croft, Harrogate, Feather Smailes & Scales LLP, 01423 501211 - Tenant fee ban will increase rents ahead of inflation.

North West

John Halman, FRICS, Wilmslow Cheshire, Gascoigne Halman, 01625 460 344, www.gascoignehalman.co.uk, jhalman@gascoignehalman.co.uk - Busy as end of summer, expect to quieten down. Worry in the market regarding the tenant fee ban and effect.

East Midlands

Andrew W York, FRICS, Leicester, Moore & York Ltd, 0116 2558666, mooreandyork.co.uk, andrew.york@mooreandyork.co.uk - Still a shortage of new instructions.

Christopher Shallice, FRICS FAAV, Holbeach, Hix & Son, 01406 422 777 - Still good demand for the best properties which are sensibly priced and well located.

David Hammond, BSc FRICS, Nottingham, David Hammond Chartered Surveyors, 01773 767776, residential@dvdhammond.co.uk, residential@dvdhammond.co.uk - Market continuing to remain steady as is tenant demand.

John Chappell, MRICS, Skegness, Property Office, 01754 763520 - Demand now exceeding supply on all fronts. Improving economy in Skegness helping market.

Nicholas Richardson, FRICS, Beeston, Nottingham, Nicholas Richardsons, 01159677589, www.nicric.co.uk, nrichardson@nicric.co.uk - Steady tenant demand but rental increases seem to have maybe slowed. We have seen an increase in evictions.

Peter Buckingham, , Market Harborough, Andrew Granger & Co, 01858 431315, www.andrewgranger.co.uk, peter.buckingham@andrewgranger.co.uk - Demand still exceeding supply.

Will Ravenhill, MNAEA MARLA, Leicester, Readings, 0116 2227575, www.readingspropertygroup.com, wravenhill@readingspropertygroup.com - New landlord instructions and agreed lettings are down on this time last year.

West Midlands

Andrew Grant, Worcester, Andrew Grant LLP, 07976982742, dcss@andrew-grant.co.uk - A balanced market

Colin Townsend, MRICS, Malvern, John Goodwin, 01684 892809, www.johngoodwin.co.uk, colin@johngoodwin.co.uk - Still a very steady market with continuing growth of rental values.

J J Dell, MRICS FAAV, Oswestry, J J Dell & CO, 01691 653437, www.jjdell.co.uk, property@jjdell.co.uk - Instructions slowly coming to the market, tenant demand is a little bit slower.

Jennifer Price, FRICS, Birmingham, Harrison Price Homes, jennifer@harrisonpricehomes.co.uk - A good market at the moment, plenty of tenant demand.

John Andrews, FRICS IRRV, Kidderminster, Doolittle & Dalley, 01562 821600 - A very busy time with many lettings having been completed and stock levels now low. Demand exceeds supply.

John Andrews, FRICS IRRV, Bridgnorth, Doolittle & Dalley, 01562 821600 - A busy time with good demand for all types of property. Demand still outstrips supply leading to some rental growth.

John Andrews, FRICS IRRV, Stourport, Doolittle & Dalley, 01562 821600 - Very much the same high demand for all types of properties as reported in previous months. It will change although more properties needed to satisfy demand.

John Andrews, FRICS IRRV, Bewdley, Doolittle & Dalley, 01562 821600 - There continues to be a consistent demand for all types of rented property with family houses receiving multiple applications to rent. A very buoyant and active market.

John Ozwell, FRICS, Solihull, Hunters, 01564 771000 - Even market at present - removal of tenant arrangement fees will cause rents to go up.

Mike Arthan, FRICS, Shropshire, Barbers, m.arthan@barbers-online.co.uk - Still a good balanced lettings market place. Tenants are more discerning so poorer quality stock is harder to let.

Nicholas Lamb, MRICS, Birmingham, Naismiths Limited, 0121 262 3450, www.naismiths.com, nicholas.lamb@naismiths.com - Demand for well managed quality rental properties continues to be strong particularly from families looking for extended occupational periods - more institutional regional product is needed urgently.

Richard Franklin, BSc (Hons) MRICS, Tenbury Wells, Franklin Gallimore, 01584 810436 - Minimum Energy Efficiency Standards now a focus for landlords, with many leaving it late. Will force rents up.

Surveyor comments - lettings

Ryan Williams, FRICS, Hay on Wye, McCartneys, ryan@mccartneys.co.uk - Taxation changes have discouraged buy to let investors with the inevitable knock on effect on supply.

Stephen Smith, MRICS, Walsall, Fraser Wood, 01922 629000 - The market appears to be slightly subdued for the time of year.

East Anglia

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

Nigel Steele, FRICS, Norfolk, Jackson-Stops, 01603 612333, www.jackson-stops.co.uk, nigel.steele@jackson-stops.co.uk - Quality and good presentation wins every time as long as the rent is at the right level.

W J Hartnell, FRICS, Brentwood, Simon Matthew & Co, 01277 355255 - Lettings have been slightly slow but we hope things will improve this autumn.

South East

Anthony Webb, FRICS, Cobham, Surrey, Trenchard Arlidge, 01932 864242, www.trenchard-arlidge.co.uk, twebb@trenchard-arlidge.co.uk - Fewer tenants, it is now cheaper to buy than rent unless rents reduce to encourage a let.

David Parish, FRICS, Upminster, Gates Parish & Co, 01708 250033 - Following a quiet period more instructions are now being received and activity is likely to increase.

Howard Mecklenburgh, MRICS, Watford, LPandM, 01923 255888, LPandM, howard@lpandm.co.uk - Shortage of good property.

James Farrance, MNAEA, FARLA, Maidenhead, Braxton, 01628 674234, www.braxtons.co.uk, jfarrance@braxtons.co.uk - Increase in volume of tenant registrations month on month.

Martin Allen, MRICS, Wingham, Canterbury, Elgars, 01227 720557, www.elgars.uk.com, m.allen@elgars.uk.com - Rents still under pressure due to shortage of properties to let. More long-term renters are now selling their properties rather than reletting and few buys to let occurring, adding to the shortage.

Michael Brooker, FRICS, Crowborough, Michael Brooker Estate Agents, 01892 663377 - High rents are sought from Landlords. Often need to lower 5%/10% to secure tenants.

Stuart Gray, MRICS FAAV, Barnet, Strutt & Parker LLP, 01727 840285, www.struttandparker.com, stuart.gray@struttandparker.com - A good level of demand in the usually strong autumn market

Anon, FRICS, South Devon - More repossessions is good news for landlords letting!

South West

Mark Annett, FRICS, Chipping Campden, Mark Annett & Company, 01386 841622 - Rentals remain strong and rents are holding up well.

Paul Oughton, MARLA, MNAEA, Cirencester & the Cotswolds, Moore Allen & Innocent LLP, www.mooreallen.co.uk, paul.oughton@mooreallen.co.uk - A drop off in supply of late but plenty of demand therefore asking rents increasing.

Peter Symons, FRICS, Totnes, Stags, www.stags.co.uk, p.symons@stags.co.uk - Short supply of available property.

Simon Cooper, FRICS, Exeter, Stags, 01392 255202, stags.co.uk, s.cooper@stags.co.uk - September was a little quieter after a fantastic August of new lets, though tenant demand is still incredibly strong in Exeter. Top end rental market has cooled.

Wales

Anthony Filice, FRICS, Cardiff, Kelvin Francis Ltd., 02920 766538, www.kelvinfrancis.com, tony@kelvinfrancis.com - Prospective Tenants taking their time in choosing properties. A number of Landlords are now selling, due to tax changes and new legislation.

John Caines, MRICS, Bridgend Port talbot Neath, Payton Jewell Caines, 01656654328, www.pjchomes.co.uk, john.caines@pjchomes.co.uk - The market remains robust with strong demand. proposed legislation will alter the dynamic of the market going forward.

Paul Lucas, FRICS, Haverfordwest, R.K.Lucas & Son, 01437762538, www.rklucas.co.uk, paul@rklucas.co.uk - The lettings market remains busy.

London

Allan Fuller, FRICS , Putney Sw152TX, Allan Fuller Estate Agents, 02087888822, www.allanfuller.co.uk, allan@allanfuller.co.uk - Tenants are staying longer in properties, there are fewer new people moving to new jobs in London, possible fewer jobs being created.

Alun Jones, MRICS, Knightsbridge, Marler & Marler, 020 7235 9641 - Regulation and taxation have made investment property less attractive. Number of new builds and accidental landlords are likely to keep rent increases to a minimum.

Angela Kelly, MRICS, Clerkenwell and City, Hurford Salvi Carr, 02074901122, www.h-s-c.co.uk, angela.kelly@h-s-c.co.uk - We have seen the usual upturn in demand between June and September fuelled by staff relocation and recruitment patterns.

James Gubbins, MRICS, Pimlico, Dauntons, 020 7834 000, www.dauntons.co.uk, mail@dauntons.co.uk - Lots of properties available, few applicants = rents reducing. Landlords need to react and make properties attractive both in terms of price and quality of decor.

Jeremy Leaf, FRICS, Finchley, Jeremy Leaf & Co, jeremy@jeremyleaf.co.uk - Rental activity improved as often happens in September but not to the same levels as previously. Few landlords are adding to portfolios while trying to ensure existing property is let at reasonable rents. Demand is fair but rents must be competitive.

John Collard, MRICS, Wimbledon, Robert Holmes & Co, 0208 879 9669, www.robertholmes.co.uk, jilly@robertholmes.co.uk - Supply still far outweighs demand and budgets remain low.

John J.King, FRICS, L.B.Merton, Andrew Scott Robertson , 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - Steady number of enquirers although a slowdown in actual deals is evident by stock levels remaining high.

John J.King, FRICS, Wimbledon, Andrew Scott Robertson , 020 8971 6780, www.as-r.co.uk, jking@as-r.co.uk - A quieter month than expected with fewer registrations. The thought of an interest rate rise may accelerate reductions in asking rents as landlords take cover.

Josh Homans, MRICS, East London, Valunation, Joshua.homans@valunation.com - Rents have enjoyed a seasonal adjustment but this is about to deteriorate with capital values following close behind.

Mark Wilson, MRICS, London, Globe Apartments, 020 7935 9512, www.globeapt.com, mark@globeapt.com - As far as rent is concerned the market is continuing on a downward trajectory. We will know when it hits the floor or that there is an equilibrium when the phones start ringing like they used to. Landlords continue to be fantasists.

Surveyor comments - lettings

Peter Tym, FRICS, London, ESV, 02085676817, tymtym@gmail.com - Brexit effect reducing demand.

Robert King, Richmond, Jackson-Stops & Staff, 020 8943 9777 - Landlords selling.

Simon Aldous, MRICS, London, Savills, 02070163861, savills.co.uk, saldous@savills.com - Falls in rents have slowed, not as bad as previous months and the last quarter.

Will Barnes Yallowley, Assoc RICS, Kensington London, LHH Residential LLP, 02073762286, www.lhhresidential.co.uk, will@lhhresidential.co.uk - The market appears to be flat with the anticipated September lift having not materialised.

Scotland

Ian Fergusson, BSc FRICS, Stirling, J&E Shepherd, 01786450438, www.shepherd.co.uk, ian.fergusson@shepherd.co.uk - Stable market, rents holing up and demand resilient - tax changes to this sector seeing less activity from small investors and predictable increase in rents as stock levels reduce.

Ian Morton, MRICS, St Andrews, Bradburne & Co, 01334 479479, www.bradburne.co.uk, ian@bradburne.co.uk - The letting market remains buoyant with good tenant demand and reasonable availability of properties to let. Some unsold properties are being offered for let.

John brown, FRICS, Edinburgh, JOHN BROWN and COMPANY, 07768583919, jb-uk.com, john.brown@jb-uk.com - Less landlords because Scotland now has new tenancy changes- added to tax changes. There will be more PRS in the system as this is a developing market. Still positive on rents.

John Gell, MRICS, Inverness, Simply Let, 01463 718888, www.simplylet.biz, john.gell@simplylet.biz - Tenant demand up slightly, but notable decline in enquiries from eastern Europeans. European tenants also returning home. Investors still active.

Neil Woodhead, FRICS, Inverclyde, Castle Estates, 01475784781, www.castle-estates.co, neil@castle-estates.co - Very low supply of quality properties available.

Northern Ireland

Harry Clarke, FRICS, Ballymena, Harry Clarke & Co, 028 256 48829 - Rental demand increasing, supply of rental properties being affected by taxation - less "buy to rent" activity, hence lower supply for tenants.

Kirby O'Connor, AssocRics, Belfast, GOC Estate Agents Ltd, 02890662366, gocestateagents.com, kirby@gocestateagents.com - We have just come through our busiest time, rentals are in huge demand especially 3 bedrooms.

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