



## September 2016: UK Residential Market Survey

# Buyer enquiries begin to pick-up modestly

- Buyer demand increases for the first time in seven months although conditions vary across the UK
- House prices continue to rise while new instructions remain scarce
- Downward trend in sales eases with expectations continuing to improve

The September 2016 RICS Residential Market Survey results show new buyer enquiries increased for the first time since February, albeit the pick-up was only modest. Alongside this, new instructions to sell slipped further, with the lack of supply firmly underpinning prices at the headline level. What's more, price expectations rose at the three and twelve month horizons, although both indicators remain softer when compared to the start of the year.

The national price indicator crept higher in the latest results, with a net balance of +17% of respondents noting an increase in prices (up from +13% in August). This measure has now risen in two consecutive reports having moderated for five months in a row between February and July. The regional breakdown shows prices continue to fall in Central London and the North East, although the pace of decline eased noticeably across the latter. Elsewhere, most other parts of the UK saw prices climb higher over the month.

Looking ahead, near term price expectations continued to recover gradually at the headline level, with the national series posting the strongest net balance since March. Conversely, three month price expectations slipped back into negative territory across London, after registering a broadly neutral reading in the previous report. Anecdotal evidence suggests that uncertainty following the EU vote, along with Stamp Duty changes, are both continuing to adversely impact the top end of the market in particular. At the twelve month horizon, the net balance data shows prices in the capital are expected to see little change, making London the only area in which prices are not projected to rise over the year ahead (this again largely reflects the picture in central areas and the higher end of the market).

Back at the headline level, new buyer enquiries increased for the first time in seven months, with a net balance of +8% more respondents reporting a pick-up in demand (rather than a decrease). This measure improved from -5% (revised from an initial figure of -7%) previously and has shown a significant turnaround relative to June, when a balance of -34% was posted. Nevertheless, the headline figure masks considerable variation across the UK, with some agents seeing a more stable trend in demand emerging as opposed to any recovery just yet.

Alongside this, new sales instructions fell once more, marking the seventh straight month in which new listings have declined. In fact, with the exception of a few months around the turn of the year, the flow of new stock coming to market has dwindled continuously over the past two years. As such, average stock levels on estate agents books remain exceptionally low. Consequently, the imbalance between marginally increasing demand and a real lack of supply is firmly underpinning prices. In addition, the lack of choice for would-be purchasers also appears to be restricting overall sales market activity.

Indeed, nationally, agreed sales were broadly unchanged for a second month running having declined sharply from May through to July. The regional picture remains mixed however, as transactions rose in six of the twelve regions/countries covered in the survey and fell across the remainder. Going forward, respondents' optimism towards the sales outlook improved, with growth expected across most parts of the UK over the next three months. Further out, over the next twelve months, contributors are projecting sales to pick-up firmly in all areas.

On a UK-wide basis, a majority of 59% of respondents feel house prices are around fair value at present, although 37% do feel their local market is overpriced to some extent. The regional breakdown shows over 60% of contributors in both the South East and London sense house prices to be above fair value currently. Within this, over 20% of London respondents feel prices are 'very expensive' relative to fundamentals. Nevertheless, this proportion has remained broadly stable over the past six months. Northern Ireland (89%), along with Scotland (83%), currently exhibit the highest share of contributors who deem residential property in their local market to offer good value.

In the lettings sector, tenant demand increased firmly during September (non-seasonally adjusted figures), with the reading signalling the strongest rate of growth in twelve months. Landlord instructions were more or less unchanged at the headline level, but did increase notably in London and Wales. London remains the only area in which rents are expected to come under pressure in the near term, while virtually all other areas are anticipated to chalk up solid gains.

\*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? (down/ same/ up)
  - 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)
  - 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 house prices, in your area, to change over the next 12 months? (% band, range options)
  - What do you expect the average annual growth rate in house prices will be over the next 5 years in your area? (% band, range options)
  - 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 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 do you perceive to be average LTVs currently being offered in the market for first-time buyers? (% band, range options)
  - What do you perceive to be average LTVs currently being offered in the market for existing owners? (% band, range options)
  - What do you perceive to be average LTVs currently being offered in the market for buy-to-let landlords? (% band, range options)
- Questions 15-18 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.

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

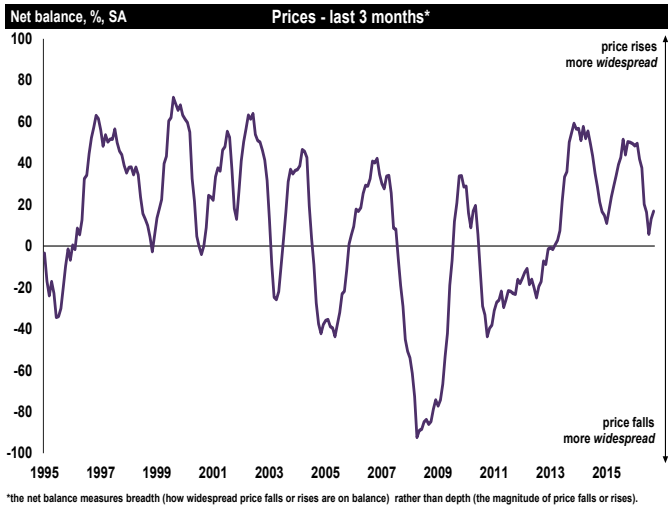
- 390 (representing 743 branches)

## Next embargo dates:

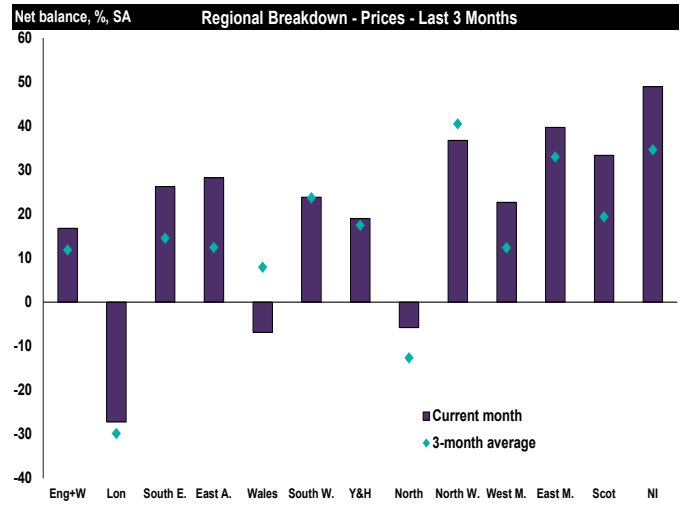
- October Survey: 10 November**
- November Survey: 8 December**
- December Survey: 19 January**

# Sales market charts

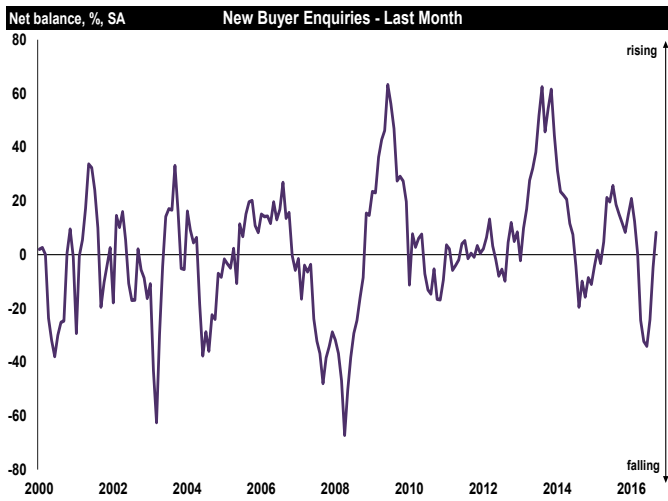
National Prices - Past three months



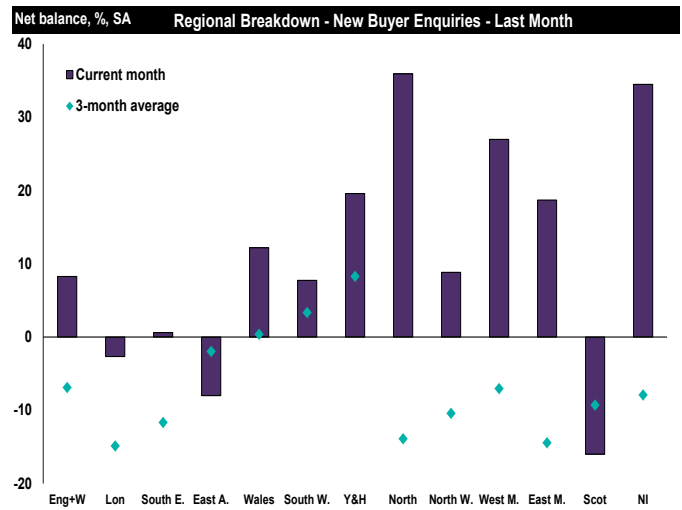
Regional Prices - Past three months



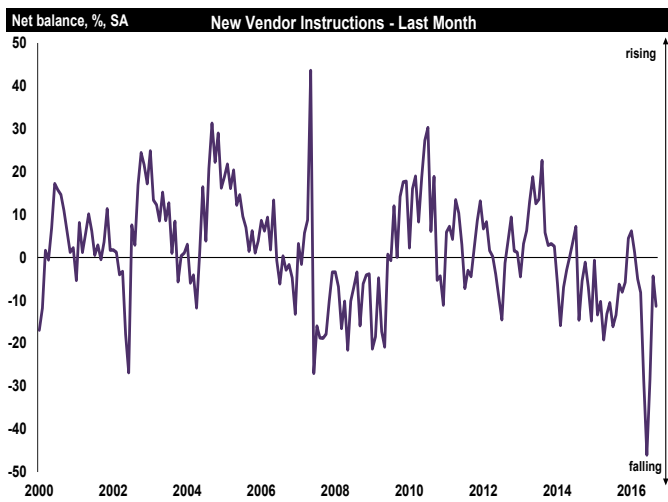
National Enquiries - Past month



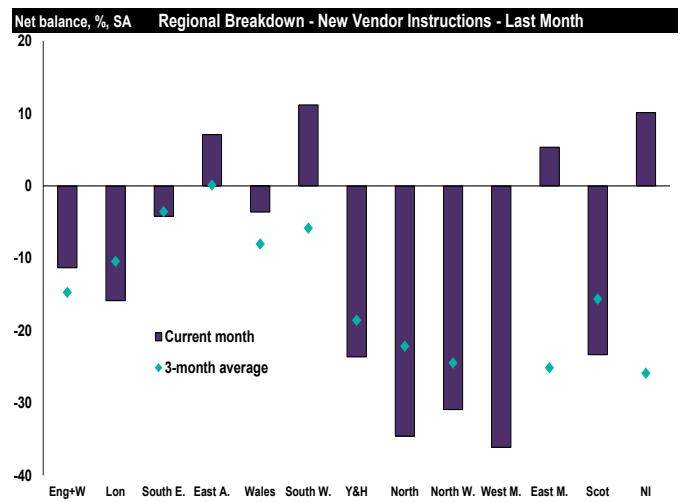
Regional Enquiries - Past month



National New Vendor Instructions - Past month

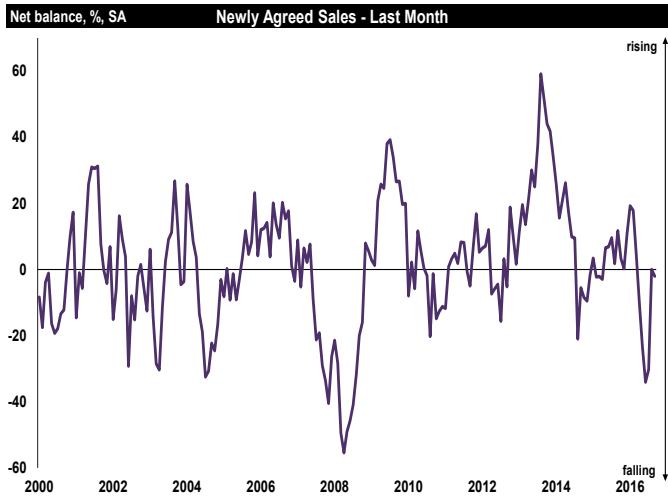


Regional New Vendor Instructions - Past month

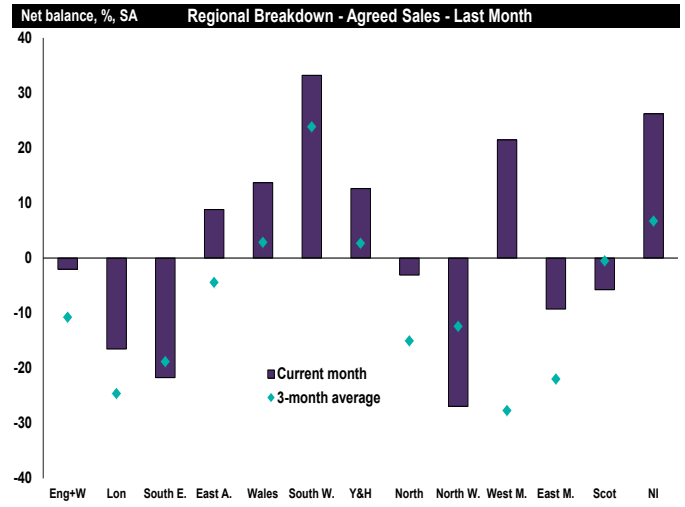


# Sales market charts

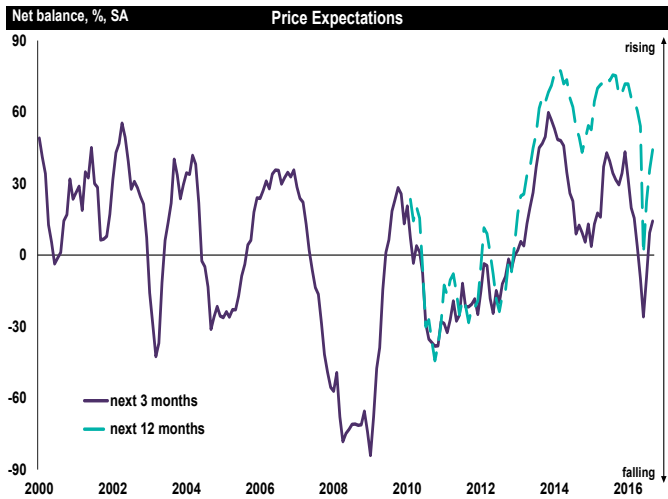
National Newly Agreed Sales - Past month



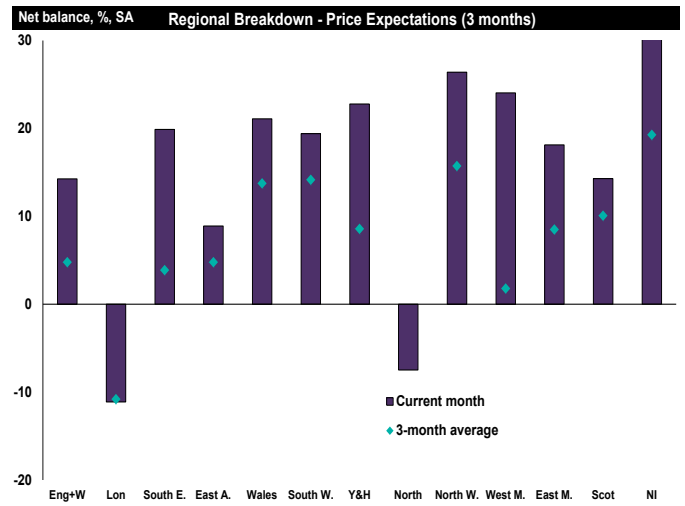
Regional Newly Agreed Sales - Past month



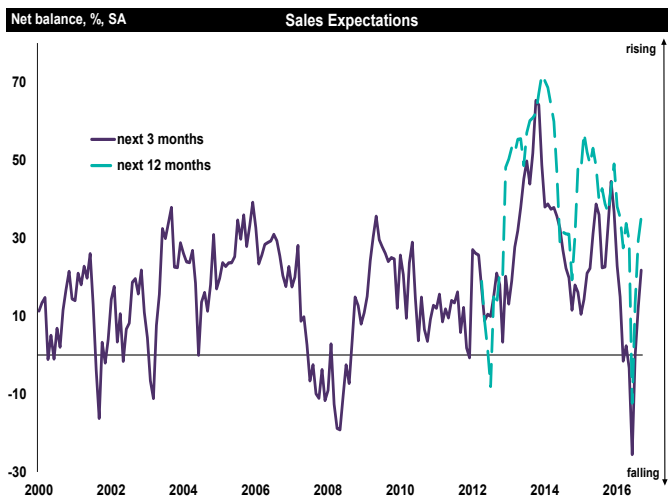
National Price Expectations - Three and twelve month expectations



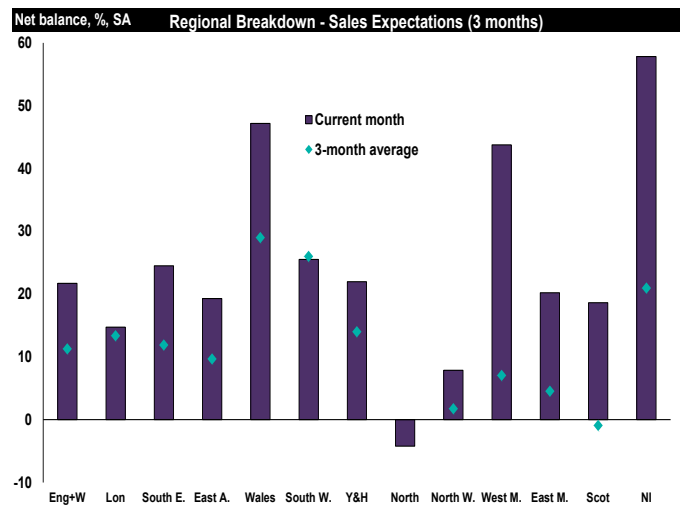
Regional Price Expectations - Next three months



National Sales Expectations - Three and twelve month expectations

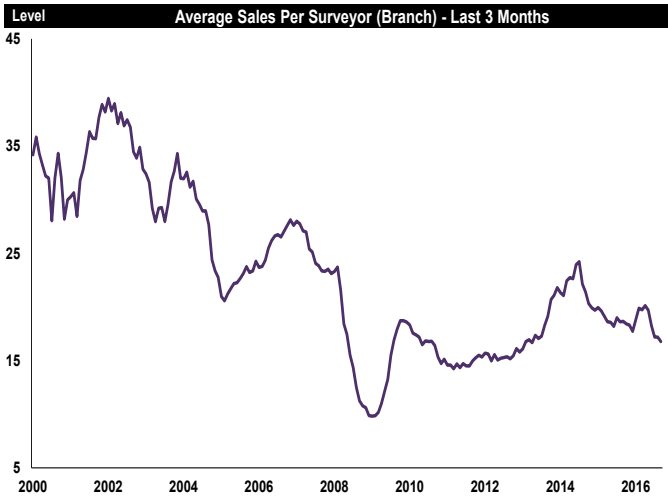


Regional Sales Expectations - Next three months

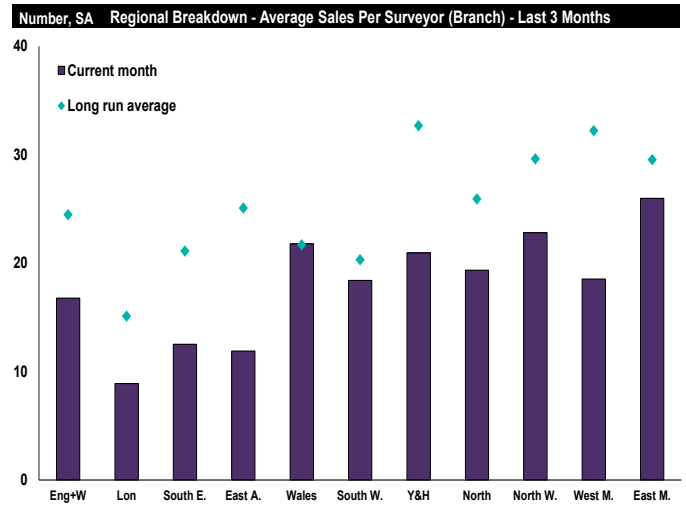


# Sales market charts

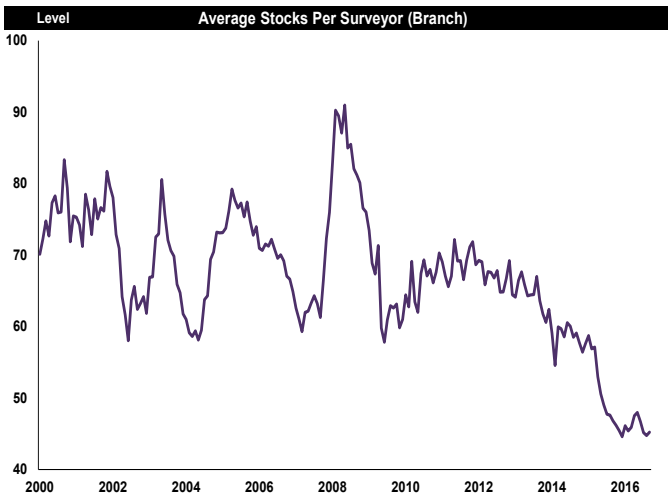
National Average Sales Per Surveyor - Past three months



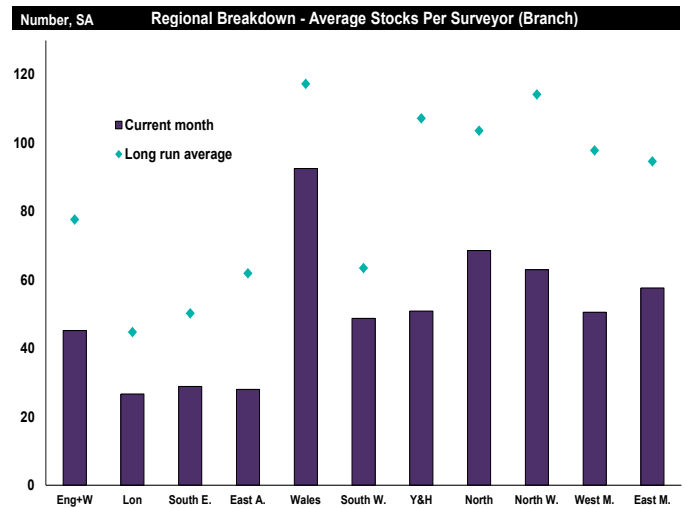
Regional Average Sales Per Surveyor - Past three months



National Average Stocks Per Surveyor



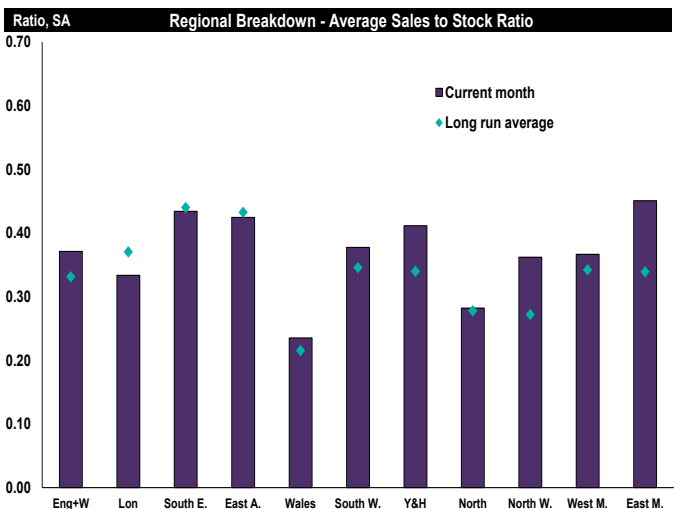
Regional Average Stock Per Surveyor



National Sales to Stock Ratio

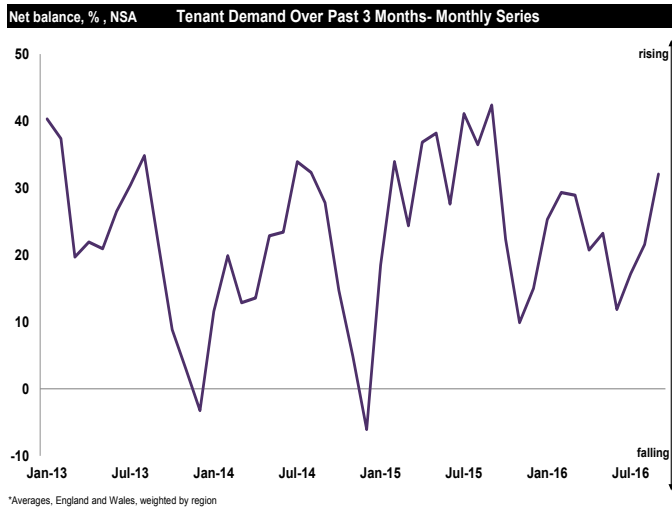


Regional Sales to Stock Ratio

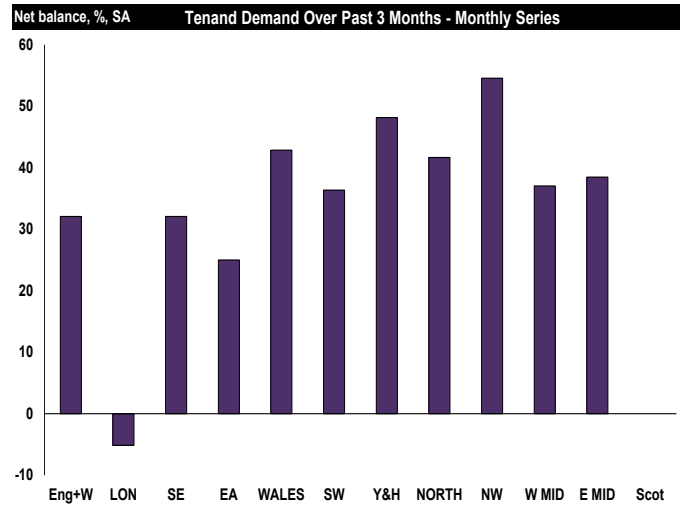


# Lettings market charts

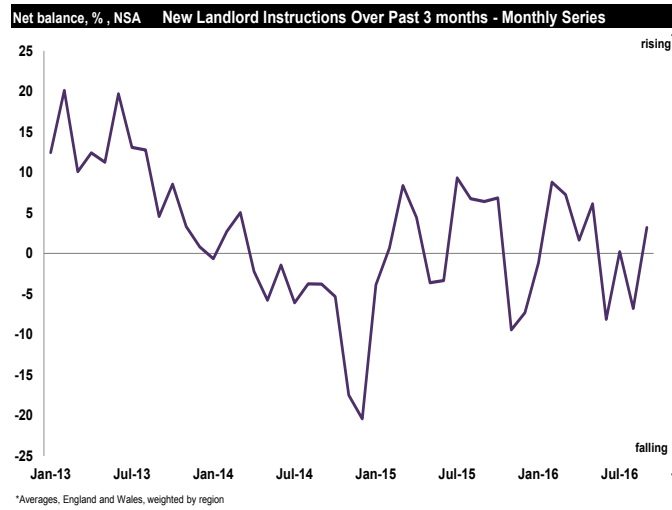
National Tenant Demand - Past three months



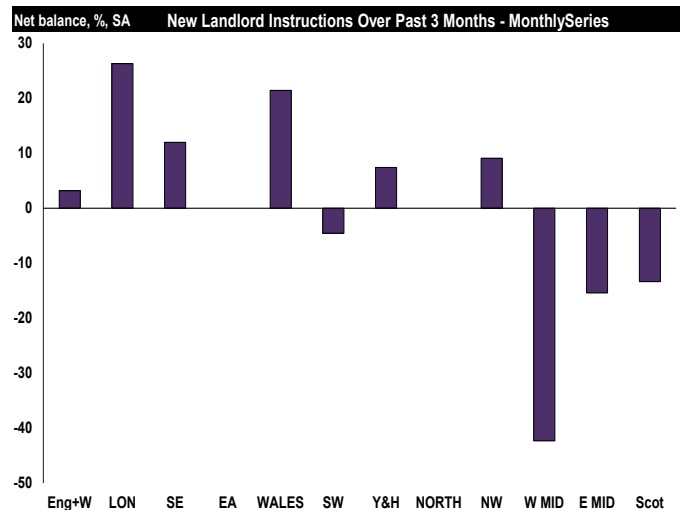
Regional Tenant Demand - Past three months



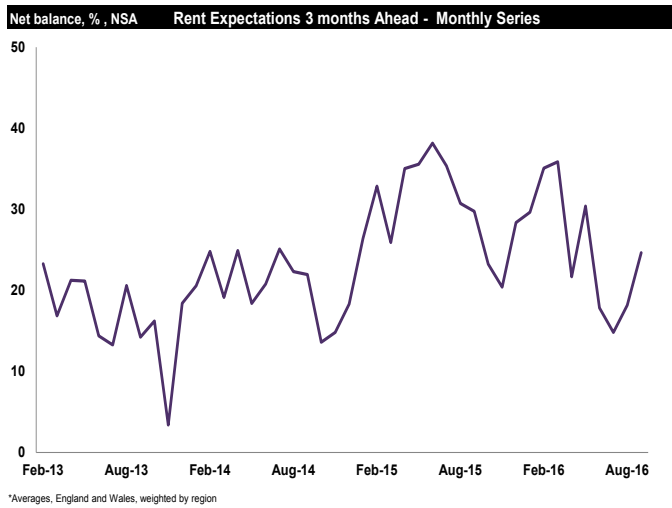
National New Landlord Instructions - Past three months



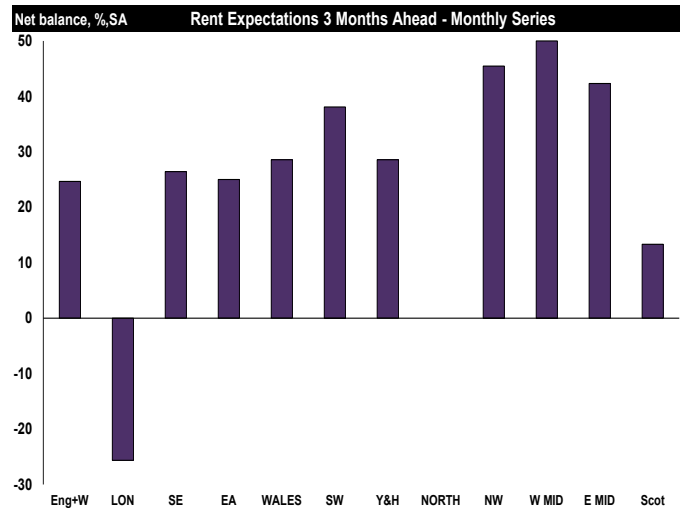
Regional New Landlord Instructions - Past three months



National Rent Expectations - Next three months

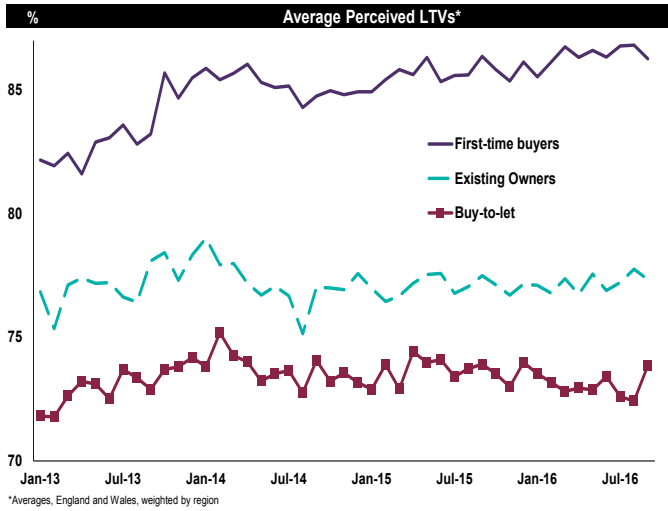


Regional Rent Expectations - Next three months

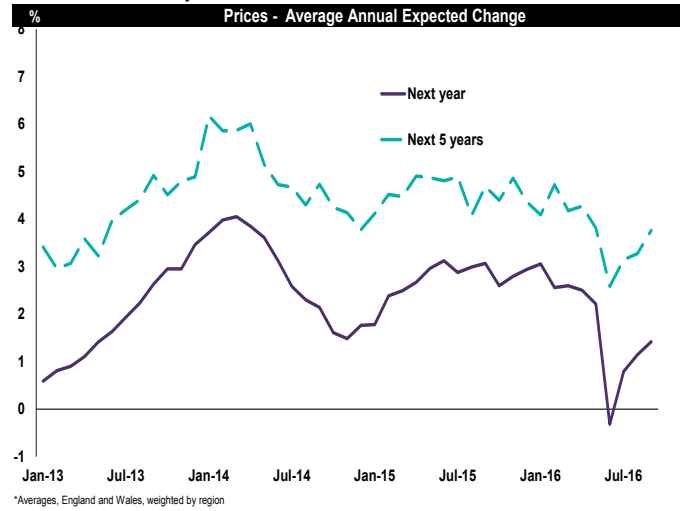


# LTVs, expectations & other data

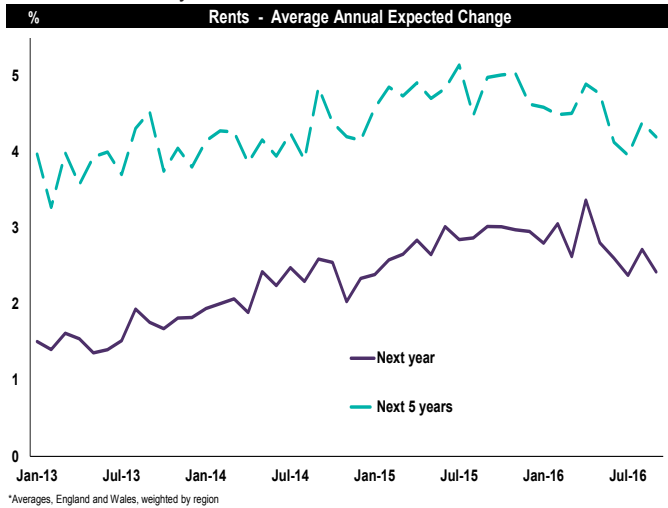
Average Perceived Loan to Value by Buyer Category



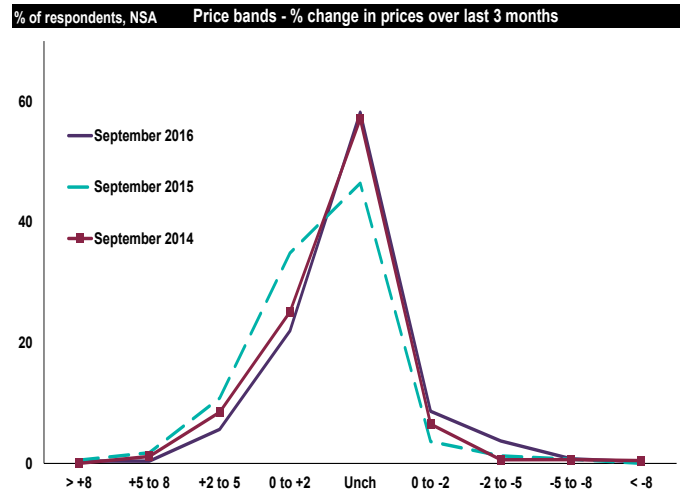
National Average Annual Expected Price Change (point estimate) - Next one and five years



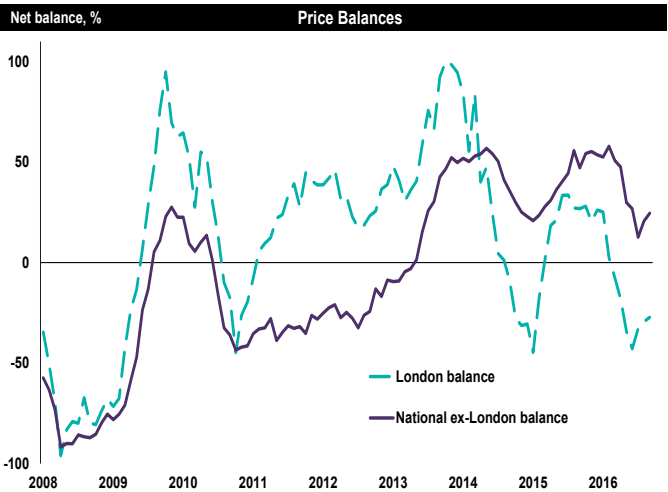
National Average Annual Expected Change in Rents (point estimate) - Next one and five years



Price Bands - Past three months



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



# Surveyor comments - sales

## North

Andrew Holmes MRICS, Thomson Hayton Winkley Estate Agents, South Lakeland, achh@thwestestateagents.co.uk - Another steady month although a fall in new instructions is giving rise to a shortage of quality stock entering the market.

Douglas B. Farmer MRICS, Hopes Estate Agents, Wigton, 016973-43641, douglasfarmer@gmail.com - Now that the aftermath of Brexit is beginning to fade we can blame the upcoming autumn and Christmas period for what continues to be an uncertain market in all price ranges. We cannot foresee the overall situation improving anytime soon.

John Reeves FRICS, Helmsley group Ltd, York, 01904 682800, john-reeves@helmsley.co.uk - Slowed a little over summer with Brexit causing issues but seems normal again now.

Keith Pattinson FRICS, Keith Pattinson Ltd, Newcastle upon Tyne, 07770602155, keith.pattinson@pattinson.co.uk - Possibly the buy-to-let market is being dampened by fiscal changes, but still demand equalling supply.

Neil Foster BSc (Hons) MRICS, Foster Maddison Property Consultants, Newcastle upon Tyne, 0191 281 8339, neil.foster@fostermaddison.co.uk - Very much back in the ring after a relatively quiet August. Buyer enquiries, agreed sales and new instructions all showing positive.

Paul McSkimmings BSc(Hons) MRICS, Edward Watson Associates, Newcastle upon Tyne, 0191 2812444, paul@edwardwatson-assoc.com - Good level of instructions. High end family homes in popular suburbs are selling well if sensibly priced. Traditional old Tyneside flats are also selling to investors out of the area.

Simon Bainbridge MRICS, Savills, Darlington, 01325 370500, sbainbridge@savills.com - The market is sluggish and, with buyers driving hard bargains, sales are only being achieved where vendors are willing and flexible.

T H Brannen FRICS, Brannen & Partners, Coastal / Newcastle, 0191 2517878, shaun.brannen@brannen-partners.co.uk - As the school term starts, the levels of activity have increased.

## Yorkshire and Humber

Alex McNeil MRICS, Bramleys, Huddersfield, 01484 530361, alex.mcneil@bramleys1.co.uk - Whilst low interest rates bolster buyer confidence, they do not provide incentive for potential vendors to sell when such poor returns are available, strangling supply of new housing stock to the market.

Ben Hudson MRICS, Hudson Moody, York, 01904 650650, benhudson@hudson-moody.com - As we have moved into the autumn, fears over Brexit seem to have subsided at present and we are seeing a busy market.

Chris Clubleby FRICS CAAV, Chris Clubleby & Co., Market Weighton, 01430 874000 - There is a shortage of new instructions generally which has been the case for some time. The market should remain stable but quieten down post-Christmas.

Christopher R Jowett BSc MRICS, Jowett Chartered Surveyors, Huddersfield, 01484 536799, chris@jowett-huddersfield.co.uk - Seasonally, demand increased in September. Agents competing on fees. Very competitive. Lack of new instructions coming on in comparison with previous years.

Ian Adams MRICS, Metropolis Surveyors, Kingston upon Hull, ianadams31@yahoo.co.uk - Fewer houses coming into the market may lead to price increases.

John E Haigh MRICS FAAV, Lister Haigh (Knaresborough) Limited, Knaresborough, 01423 860322, knaresborough@listerhaigh.co.uk - New built housing stock beginning to have an effect on supply and estate agency activity. Significant purchase incentives are favouring new build for first time buyers.

Ken Bird MRICS, Renton & Parr, Wetherby, 01937 582731, ken@rentonandparr.co.uk - Late surge of new instructions triggered by release of new retirement homes in the area, helped raise activity levels.

M J Hunter MRICS, Grice and Hunter, Doncaster, 01302 360141, griceandhunter@btconnect.com - The number of new instructions remains limited and is below what we would normally expect for September.

Nicholas Atkin FRICS, Ulllyotts, Driffield East Yorkshire, 01377 253456, nma@ullyotts.co.uk - Fair value relative to prevailing incomes in our area.

Pete Shield FRICS, Shield Estates UK Limited, Sheffield, 0114 2571000, peter.shield@shieldgroup.uk.com - Interest and demand remains steady after the summer holiday period.

Peter Green FRICS, Brearley-Greens, Halifax, 01422 330088, enq@brearley-greens.co.uk - Autumn has become, over recent years, one of our busiest and most successful periods of the year.

Steven Kontou MRICS, SK Estate Agents, Sheffield, 0114 2749730, steven@skestateagents.co.uk - The additional stamp duty to investors has had a bigger negative impact than Brexit.

## North West

Andrew Blackley MRICS, Bentley Higgs, Lytham st Annes, andrew@bentleyhiggs.com - Brexit.

Derek Coates MRICS, Venmore, Liverpool, 0151 236 0301, d.coates@venmores.co.uk - The market continues to be strong with good levels of interest. A lot will depend on how the economy reacts post-Brexit.

Ian Fox AssocRICS, Sellalect Homes, Liverpool, 0151 722 9707, ian.fox@sellalect-homes.co.uk - Brexit seemed to slow the market for a matter of weeks but potential purchasers are still there and confidence seems to be growing.

Ian Macklin FRICS, Ian Macklin & Company, HaleHale Barns Timperley, 0161 980 8011, halebarns@ianmacklin.com - The considerable expansion of offices, warehouses etc. around Manchester International Airport is creating an influx of potential buyers and tenants.

John Halman FRICS, Gascoigne Halman, Wilmslow, jhalman@gascoignehalman.co.uk - Activity levels have recovered to 2014 levels but are still a little behind those of 2015.

John Williams FRICS, MEWI, Brennan Ayre O'Neill LLP, Wirral, 01513439060, john@b-a-o.com - Strong demand in popular locations, struggling to find available stock.

Richard Powell FRICS, Ryder & Dutton, Oldham, 0161 925 3232, rpowell@ryder-dutton.co.uk - There are obviously huge regional differences between what we see and what is happening in the south of the country, particularly London.

## East Midlands

A R Gascoigne FRICS, Gascoignes Chartered Surveyors, Southwell, Nottinghamshire, 01636813245, rachelgascoigne@gascoignes.co - The market has definitely improved during the last month.

Alastair Boulton MRICS, Robert Bell & Company, Horncastle, 01507 522222, alastairboulton@robert-bell.org - Patchy market. This can vary from area to area and also different price ranges. August saw easier sales in the lower price ranges, so average prices fell.



## Surveyor comments - sales

Andrew York FRICS, Moore & York, Leicester, 0116 2558666 - Best September sales since 2006.

Chris Charlton BSc FRICS, Savills, Nottingham, 01159348020, ccharlton@savills.com - A very acceptable market up to £1m. In excess of that figure, properties need to be best in class and sensibly priced. Good level of proceedable new applicants.

Christopher Shallice FRICS FAAV, Hix & Son, Holbeach, 01406 422 777 - Steady. Activity mainly at the lower end of the market.

D P Hammond BSc FRICS, David Hammond Chartered Surveyors, Nottinghamshire, 01773 533666, mail@dvdhammond.co.uk - Continued lively activity post-Brexit. Lack of new stock coming to the market.

Dan Elliott MRICS, Wilkins Vardy Residential Ltd, Chesterfield, 01246 270123, dan@wilkins-wardy.co.uk - Brexit recovery has been very positive, although viewings and new buyer enquiries are down. There is huge competition for new stock which is resulting in some high asking prices, but buyers are holding firm with their offers.

David Hawke FRICS, David Hawke & Co., Worksop, 01909 531450 - Signs are more positive with still a patchy market but perhaps more traditional confidence and movement.

David Moore MRICS, Harwoods, Wellingborough, 01933441464, david@harwoodsproperty.co.uk - Brexit had no perceivable effect on the local market but the holiday period has seen a significant slowdown.

Jonathan Harvey BSc (Hons) MRICS, Lifestyle Homes, Melton Mowbray, harvey2share@hotmail.com - Higher confidence in buyers is driving sales.

Marcus Linsey BSc (Hons) MSc MRICS, Auction House Copelands, Chesterfield, 01246 232698, msl@copelands-uk.co.uk - At Auction House South Yorkshire & Copelands we had one of our best starts to the year. After April, increased stamp duty land tax on second homes was introduced, along with the EU referendum result and the school summer holiday really knocked the market.

Mark Newton FRICS, Newton Fallowell, Grantham, 01476 591900, mark.newton@newtonfallowell.co.uk - September was level with 2015 on both sales and instructions. The pipeline is within 5% suggesting last quarter was level. With a fair wind, we will match 2015 year on year.

Martin Pendered FRICS, Martin Pendered & Co Ltd, Wellingborough, 01933 228822, mpendered@martinpendered.co.uk - September showed that Brexit has had little effect on sales. Instructions were up as well as sales, with demand still in excess of supply but becoming more balanced. Modest price rises appear likely in the short term.

Paul Perriam BSc (Hons) MRICS, William H Brown/ Bagshaws Residential, Nottingham, 01332 542299, paul.perriam@sequencehome.co.uk - Strong buyer activity and good level of instructions following the summer period.

Peter Buckingham, Andrew Granger & Co, Market Harborough, 01858 431315, peter.buckingham@andrewgranger.co.uk - September was a great month for instructions, sales and exchanges. Fewer numbers of active buyers, but majority are very committed.

Quentin Jackson-Stops FRICS, Jackson-Stops & Staff, Northampton, 01604 632991, quentin.jackson-stops@jackson-stops.co.uk - The market is tricky and a world apart from this time last year when we were surfing the wave. Instructions are down, buyers are scarcer and prices seem to have gone backwards by a small amount. Sensible pricing is essential to achieve sales.

Steve Gadsby BSc FRICS, Gadsby Nichols, Derby, 01332 296396, stevegadsby@gadsbynichols.co.uk - Very quiet market conditions. However, realistically priced properties at lower price bracket still selling. Middle and top end of market very sluggish.

Will Ravenhill MNAEA MARLA, Readings, Leicester, wravenhill@readingspropertygroup.com - A reasonably busy summer. Vendors are still reluctant to market unless they really have to.

### West Midlands

Andrew Grant FRICS, Andrew Grant LLP, Worcester, 007976982742, dcass@andrew-grant.co.uk - A lack of stock across the Midlands is creating reluctance from would-be sellers to get into the market.

Colin Townsend MRICS, John Goodwin, Malvern, 01684 892809, colin@johngoodwin.co.uk - Still a very strong market as it has been all summer. This trend looks set to continue.

J J Dell MRICS FAAV, J J Dell & CO, Oswestry, 01691 653437, property@jddell.co.uk - Usually by the end of September we see an increase in instructions, once everyone has settled back to school, and returned from holidays.

Jennifer Price FRICS, Harrison Price Homes, Birmingham, jennifer@harrisonpricehomes.co.uk - Things appear slightly quieter than they have previously.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, 01562 821600 - Slightly quieter at the start of autumn than anticipated with more instructions needed to satisfy demand. Enquiry levels good but needs to be satisfied with more properties.

John Andrews FRICS IRRV, Doolittle & Dalley, Bridgnorth, 01562 821600 - Still a healthy market with no shortage of buyers for the right realistically priced property. Some slight variation in volume of buyers in certain price ranges but overall an active market.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, 01562 821600 - More properties needed to satisfy demand. Interesting individual properties very much in demand and buy-to-let investors are looking for suitable rental properties. Overall a buoyant market.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, 01562 821600 - A shortage of instructions evident and many buyers frustrated by lack of properties available. More properties needed to satisfy demand, including properties suitable for renting for which buy-to-let investors are seeking.

John Ozwell FRICS, Hunters, Solihull, 01564 771000 - Consistent level of sales. Brexit had no effect. Concerned about end of "Help-to-Buy".

Mike Arthan FRICS, Barbers, Shropshire, m.athan@barbers-online.co.uk - Sales better than expected, but delays causing more fall throughs. Less investor activity.

Paula Tinsley, Whittaker & Biggs, Biddulph, paula.tinsley@whittakerandbiggs.co.uk - Stamp duty changes on second homes have hindered some of our sales.

Richard Franklin BSc (Hons) MRICS, Franklin Gallimore, Tenbury Wells, 01584 810436 - Stock levels very low with the financial uncertainty of Brexit continuing to be key issue. Good level of strong applicants is encouraging.

## Surveyor comments - sales

Ryan Williams FRICS, McCartneys, Hay-on-Wye, 01497 820 778, ryan@mccartneys.co.uk - Slightly better as the effect of the Brexit vote wears off - a bit patchy and cash buyers looking to drive hard bargains. Supply has slowed generally which helps sustain prices.

Stephen Smith MRICS, Fraser Wood, Walsall, 01922 629000 - There are still not enough properties coming onto the market after the summer holidays, although the general activity with buyers is very high for properties that are still sensibly priced.

### East Anglia

A E Bromley-Martin MRICS, Bedfords, Woodbridge, 01394 779444, antony@bedfords.co.uk - A good, robust period of both instructions and sales; despite it being summer and post-Brexit. All looks positive.

Andrew Wagstaff MRICS, Bedfords, Burnham Market-North Norfolk, 01328 730500, andrewwagstaff@bedfords.co.uk - Shortage of supply is fuelling demand and prices are subsequently stable.

David H Knights MRICS, David Brown & Co, Ipswich, 01473 222266, mail@davidbrown-ipswich.co.uk - There are small signs of more property coming onto the market but many properties are still being overvalued and cheap fees offered. Realistically priced properties are generally selling well.

Jan Hytch FRICS, Arnolds, Norwich, 01603 620551 - Brexit is now out of mind and prices and sales seem to have grown in the previous 2 months. Norfolk is as popular as ever with buyers out of county.

Jeffrey Hazel FRICS, Geoffrey Collins & Co., Kings Lynn, 01553 774135 - The usual September increase in sales did not occur but sales are steady and instructions continue to be received.

Mark Wood MRICS, Carter Jonas, Cambridge, 01223 403330, mark.wood@carterjonas.co.uk - Potential purchasers are tending to take longer to make decisions, with many making offers below guide price.

Nigel Steele FRICS, Jackson-Stops & Staff, Norfolk, 01603 612333, nigel.steele@jackson-stops.co.uk - Whilst we have seen a reasonable level of instructions and viewings, getting sales commitments is very hard work and likely to remain so through the winter.

Ollie Peacock MRICS, Jackson-Stops & Staff, Bury St Edmunds, 01284 700535 - There is a core of well-motivated serious buyers and sellers in the market who are responsible for the activity but also a great deal of uncertainty, confusion and concern about the economic outlook.

Tom Goodley MRICS, Strutt & Parker, Norfolk, 01603617431, tom.goodley@struttandparker.com - Demand remains healthy but the competition between agents seems to be pushing up asking prices in some sectors of the market.

W J Hartnell FRICS, Simon Matthew & Co., Ingatstone, 01277 355255 - Slow.

### South East

A Ramsay FRICS, Surrey, ar221@sky.com - Brexit pause.

Andrew Turner AccocRICS, Countrywide, London, andrew.turner@cwsurveyors.co.uk - Quieter over the summer holiday period, now starting to pick up. Re-mortgage applications increasing following the rate drop.

Anthony Jamieson MRICS, Clarke Gammon Wellers, Guildford, 01483 880905 - Lack of stock still an issue. Property over £2m very difficult to sell.

Anthony Webb FRICS, Trenchard Arlidge, Cobham, Surrey, 01932 864242, twebb@trenchard-arlidge.co.uk - The market over £1m still quiet due to excessive stamp duty levels deterring buyers and influencing all price range activity.

Ben Runciman MRICS, Byrne Runciman, Wickham, Fareham, runciman.ben@gmail.com - Stamp duty increases are suppressing market activity.

Chris Gooch MRICS, Carter Jonas, Winchester, chris.gooch@carterjonas.co.uk - Market activity in September has been encouraging after a lacklustre summer.

Clive Rutland FRICS, Moses Rutland, Southampton, 023 8066 3451, totton@mosesrutland.com - There is a dearth of instructions with little choice on the market, but an adequate, albeit reducing, number of buyers. Repayment mortgages are a brake on the market. Investors willing to pay extra costs to get a still reasonable return.

Colin Bernhardt BSc FRICS, Bernhardt Associates LLP, Bognor Regis, bernhardt.assoc@btconnect.com - Brexit caused the market to stall for just over a month and then things picked up. School holidays also caused a slowdown.

David Nesbit FRICS, D.M.Nesbit & Company, Portsmouth, 02392 864321, davidnesbit@nesbits.co.uk - Another active month, with considerable property auction interest. Cheap funding is however fuelling higher prices where supply is limited. A more positive and encouraging outlook.

David Parish FRICS, Gates Parish & Co., Upminster, 01708 250033 - A general lull in activity since Brexit but market is now beginning to improve. Sales were up in September and more instructions are now being received.

E Rook MRICS, Knight Frank, Sevenoaks, edward.rook@knightfrank.com - Stamp duty still stalling the market.

Evan Owen-Powell MRICS, Owen Powell LTD, Brighton, op@owen-powell.com - Low number of transactions in historical terms.

Glen Crump AssocRICS, LSL Land & New Homes, Southampton, gcrumpy@hotmail.com - I do not feel we have yet experienced the worst effects of Brexit and these may occur when article 50 is issued.

Ian Perry FRICS, Perry Bishop and Chambers, Faringdon Lechlade/Wantage/Witney/Highworth, 01285 655355, ianperry@perrybishop.co.uk - Market improving as usual into the autumn.

James Dawson MRICS, Jackson-Stops, Newbury, 01635 45501, james.dawson@jackson-stops.co.uk - More enquires being generated and more appraisals within the last month, but each sale is taking longer and proving more complicated than in the past.

James Farrance MNAEA, FARLA, Braxton, Maidenhead, 01628 674234, jfarrance@braxtons.co.uk - September saw the usual post August surge of activity with an increase in new instructions and sales agreed.

James Scott-Lee FRICS, The Chancellors Group of Estate Agents Ltd, West London/Home Counties/Herefordshire and Powis, 01344408100, james.scott-lee@chancellors.co.uk - Confidence is returning and with it new sales.

John Frost MRICS, The Frost Partnership, Amersham, 01494 680909, beaconsfield@frostsurveyors.co.uk - New buyer enquiries directly relate to new instructions and both at a low level. Price reductions quite evident with other agents.

John Frost MRICS, The Frost Partnership, Ashford, 01494 680909, beaconsfield@frostsurveyors.co.uk - September has seen a bounce back, but increased supply is leading to some discounting.

## Surveyor comments - sales

John Frost MRICS, The Frost Partnership, Beaconsfield, 01494 680909, beaconsfield@frostsurveyors.co.uk - The sales market is purely driven by price. Right price then buyers will react.

John Frost MRICS, The Frost Partnership, Burnham, 01494 680909, beaconsfield@frostsurveyors.co.uk - Lower number of enquiries in September but still good sales results.

John Frost MRICS, The Frost Partnership, Gerrards Cross, 01494 680909, beaconsfield@frostsurveyors.co.uk - Low end market active due to low interest rates. Top end still adversely affected by stamp duty and Brexit uncertainty.

John Frost MRICS, The Frost Partnership, Langley, 01494 680909, beaconsfield@frostsurveyors.co.uk - Slightly more stock available and new stock has to be priced correctly to encourage viewings.

John Frost MRICS, The Frost Partnership, Slough, 01494 680909, beaconsfield@frostsurveyors.co.uk - Evidence of a more "balanced" market place between vendors and purchasers. Property needs to be offered at market orientated prices to be of interest to purchasers.

John Frost MRICS, The Frost Partnership, Staines, 01494 680909, beaconsfield@frostsurveyors.co.uk - Higher sale asking prices still correcting themselves post-Brexit and after the slow summer months.

John Frost MRICS, The Frost Partnership, Windsor, 01494 680909, beaconsfield@frostsurveyors.co.uk - Upper end of the market is challenging due to stamp duty costs but remainder of the market is still active if the properties are priced sensibly.

Martin Allen MRICS, Elgars/Wingham/Canterbury, 01227 720557, m.allen@elgars.uk.com - Shortage of supply still putting upward pressure on prices.

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

Martin Seymour BSc FRICS, Crow Watkin, Reigate, 01737 245886 - Prices on agreed sales seemingly unaltered from early summer levels but still a shortage of new instructions.

Michael Brooker FRICS, Michael Brooker Estate Agents, Crowborough, 01892 663377 - August busier than anticipated. No post-Brexit affect (yet!). High level of viewings. Greater desire to negotiate than 6 months ago. Normal market.

Mike Hewson FRICS, Howard Cundey, Lingfield, 01342 833333, mikehewson@howardcundey.com - "Patchy" is probably a fair description. New instructions quietening down - normal for this time of year. New sales a bit of a struggle as there is still a good deal of uncertainty. But deals are being struck and exchanges happening.

Paul Coutts FRICS, The Livemore Partnership, Southend on Sea, paul.coutts22@gmail.com - Closeness to London a major factor.

Philip Hiatt MRICS, Your Move Philip Hiatt, East Grinstead, 01342 321142, eastgrinstead@your-move.co.uk - Sales overall were as expected in September and up on July and August as confidence returned to the market.

Philip Newman MRICS, Chartered Valuation Surveyor, Nationwide Building Society, South Hampshire, 07887830021, philip.newman@nationwide.co.uk - The market slowed a little over the summer months with fewer new instructions but overall it still seemed busier than usual for the time of year.

Rob Swiney MRICS, Lacy Scott and Knight, Bury St Edmunds, 01284 748636, rswiney@lsk.co.uk - Market is fairly flat at the moment. The right house, sensibly priced, is seeing activity but other properties are slow.

### South West

Chris Philpot FRICS, Lacy Scott and Knight, Stowmarket/Suffolk, cphilpot@lsk.co.uk - The late summer has seen some fine houses coming to the market and attracting much interest, but it needs a positive attitude. Those who are committed will achieve a move, but the waverers may be disappointed.

Christopher Bailey MRICS, Knight Frank, Exeter, 01392 423111 - SDLT continues to be the overriding factor in keeping a lid on price growth.

David Lewis BSc(Hons), Stags Estate Agents, South West Devon/East Cornwall, 01752 223933, d.lewis@stags.co.uk - Steady as she goes - weak supply underpinning prices by creating artificially high demand.

David McKillop FRICS, McKillop and Gregory, Salisbury, dm@mckillopandgregory.co.uk - A quiet start to the month but things have picked up in the last week. Properties below £500,000 selling well, but above that it is very quiet. Investment buyers still very active. Very few first time buyers.

GC Thorne FRICS, Thornes with Fisks, East Dorset, 01202-684004, graham@thornes.org.uk - The market has stabilised following the Brexit vote and a number of the developments planned are now showing signs of proceeding.

Ian Perry FRICS, Perry Bishop and Chambers, Cheltenham/Cirencester/Nailsworth/Stroud/Tetbury, 01285 655355, ianperry@perrybishop.co.uk - Market improving as usual into the autumn.

James Wilson MRICS, Jackson Stops and Staff, Shaftesbury, 01747 850858, james.wilson@jackson-stops.co.uk - We have seen reasonable activity up to £1 million, but not such a strong autumn market.

Jeff Cole MRICS, Cole Rayment & White, Wadebridge, 01208813595, jeff.cole@crw.co.uk - An increase in instructions has led to better levels of sales as we expected after a very quiet August. We are hopeful that this will continue into October and obviously the weather lately has certainly helped.

Jeremy Priestley FRICS, Berkeleys, Poole, jeremy.priestley@yougroup.co.uk - SDLT, not Brexit, is the underlying cause of atrophying market.

John Corben FRICS FCIARB, Corbens, Swanage, 01929 422284, john@corbens.co.uk - The last few months has seen a good number of sales, however, demand is outstripping supply. Prices are stable.

Laurence APC Candidate, Rige, Berkshire, prm90201@myport.ac.uk - Unseasonal weather and market growth has created a busy period.

Lloyd Smale FRICS, Drew Pearce, Exeter, 01392 686347, lms@drewpearce.co.uk - August and September have seen an encouraging increase in buyer enquiries and sales agreed, supply side still tight as potential vendors put off their commitment to moving.

Mark Annett FRICS, Mark Annett and Company, Chipping Campden, 01386 841622 - Brexit has made no difference so far. We have been busy as per normal autumn market. Supply and demand is at work.

Matthew Harvey MRICS, Tayler and Fletcher, Bourton on the Water, matthew.harvey@taylerandfletcher.co.uk - Good volume but transactions very difficult to get over the line.

Matthew Waddams MRICS, Matthew Waddams, Minehead, 01643 709929, matthewwaddams@hotmail.com - The residential market in West Somerset has returned to pre-Brexit levels. There is currently a shortage of property offered for sale.

# Surveyor comments - sales

Michael Dukes MRICS, Greenslade Taylor Hunt, Taunton, 01823 277121, michael.dukes@gth.net - September has continued with the same solid results as August which will have resulted in a decent pipeline and should produce solid results in Q4. Still comfortably ahead on 2015 and expectations for 2017 seem encouraging.

O F Miles FRICS, Oliver Miles, Swanage, 01929 426655, oliver@olivermiles.co.uk - A busy month for sales but dearth of new instructions.

Peter Sinclair MSc MRICS, Connells Survey and Valuation Ltd, Cheltenham/Gloucester/Cotswolds, peter.sinclair@connells.co.uk - No significant slowdown in number of instructions coming through and prices still going over the asking price, mainly due to a shortage of supply.

Simon Barker MRICS, Knight Frank, Sherborne, simon.barker@knightfrank.com - Post-Brexit appears to be dampening activity in the Autumn market. The immediate effect of the referendum was hardly noticeable.

Simon Cooper FRICS, Stags, Exeter, 01392 255202, s.cooper@stags.co.uk - September was the best month of the year for exchanges though sales a little lower than the previous September. 2016 has been a massively better year than 2015, despite Brexit.

Stephen Morris MRICS, Davies & Way, Bristol & Bath, 01225 400400, stephenmorris@daviesandway.com - A noticeable cooling is activity for larger houses (£500,000 plus) where sellers are having to be realistic and take advice to achieve sales. Lower price ranges remain buoyant with prices still increasing.

## Wales

Andrew Morgan FRICS FAAV, Morgan and Davies, Lampeter, 01570423623, lampeter@morgananddavies.co.uk - A frustrating market. The rural economy remains fraught with more sellers than buyers. However, there are buyers with intentions.

Anthony Filice FRICS, Kelvin Francis, Cardiff, 02920766538, tony@kelvinfrancis.com - Strong increase in numbers of new instructions, high end properties ie. £1,000,000 selling well. Demand across all price ranges. Next quarter, the housing market looks promising.

Caroline Jones MRICS, Bruton Knowles, Cardiff, caroline.jones@brutonknowles.co.uk - Stamp duty change.

David James FRICS, James Dean, Brecon, 01874 624757, david@jamesdean.co.uk - Fewer enquiries and sales in September than earlier months in the year.

David Owen Evans FRICS, Clare Evans & Co, Rhayader, 01597 810457, clare.evans@clareevansandco.co.uk - The sales market has ramped up since the end of the summer holidays and viewings are encouraging.

Iwan Jones, Dafydd Hardy Estate Agents, Llangefni, 01248 723322, iwanjones@dafyddhardy.co.uk - Announcement of Britain leaving the EU, which has caused uncertainty along with the second home taxation, will slow the second home market down or certainly the number of transactions and the amount offered.

John Caines FRICS, Payton Jewell Caines, Bridgend, 01656 654328 - The market remains buoyant. The level of instructions across the region will impact the market in the near term.

Paul Lucas FRICS, R.K.Lucas & Son, Haverfordwest, 01437762538, paul@rklucas.co.uk - Activity continues to improve after the initial Brexit shock.

## London

Alun Jones MRICS, Marler & Marler, Knightsbridge, 020 7235 9641 - The principal issue in the prime Central London market remains the effect of changes to taxation. Until vendors reflect increased costs from SDLT in particular, the low level of transactions will prevail.

Brendon Thomas MRICS, Oakland Surveyors, Tower Hamlets/Hackney/Newham/Southwark, 07837210662, b.thomas@oaklandsurveyors.co.uk - Mid-lower end of the market fairly buoyant, better than July. Decent buyer interest, average stock levels.

Christopher Green FRICS, Curzon Land, London, 020 7720 6800, cgreen@curzonland.com - Uncertainty on what the government will do next to penalise the residential sector further.

Christopher Ames MRICS, Ames Belgravia Ltd, Belgravia SW1, 020 7730 1155, ca@amesbelgravia.co.uk - Hopefully the Brexit timetable announced this week will assist market confidence. The upper end of the market in London has not yet recovered since the Dec 2014 SDLT increase. The extra 3% for second homes from April 2016 is having an impact this year.

Ian J Fergusson BSc FRICS, SBVS, London/UK, ian.fergusson@sbvals.co.uk - The long drag post-referendum is still an influence on house prices, however, more impact has been caused by stamp duty changes and tax on second homes plus lack of homes for sale.

James Gubbins MRICS, Dauntons, Pimlico, 020 7834 8000, mail@dauntons.co.uk - Some vendors are inclined to entertain offers in the belief that the market may soften in the wake of increased stock levels. Certainly those continuing to be over ambitious with their prices are struggling to sell.

James Perris MRICS, De Villiers, Central London, 020 7887 6009, www.devilliers-surveyors.co.uk - Whilst activity is back to pre-referendum levels, market conditions remain challenging with buyers cautious and the high transactional costs preventing much activity at the upper tiers of the market.

Jeffrey Doble MRICS, Thamesview (Incl Dexters Estate Agents), Teddington, 020 8614 1230 - Sales market recovered to normal activity levels.

Jeremy Leaf FRICS, Jeremy Leaf & Co, Finchley, jeremy@jeremyleaf.co.uk - The market proved to be quite resilient for buyers and sellers returning from holiday in September with solid exchanges of contract. Listings have increased considerably although there seems to be little buyer urgency to commit quickly.

John King FRICS, Andrew Scott Robertson, Merton, 020 8971 6780, jking@as-r.co.uk - While applicant registrations were lower, viewing statistics were higher, resulting in more offers and agreed sales.

John King FRICS, Andrew Scott Robertson, Wimbledon, 020 8971 6780, jking@as-r.co.uk - September was surprisingly active. Sales agreed up, as are instructions, but expecting this level to fall unless price reductions occur more frequently.

Jonathan Price AssocRICS, Southside Property Management Services LTD, Bromley, 0330 999 1612, jonathan@southside-property.co.uk - Short term effects on demand and enquiries arising from macro uncertainties / government influences with the potential for a longer term slowdown.

Keith Barnfield FRICS, Barnfields, Enfield, 020 8363 3394 - There has been a significant increase in the number of properties coming onto the market. The expectations of vendors need to be carefully managed if sales are to be achieved.

# Surveyor comments - sales

Paul L Whitley FNAEA MARLA, R Whitley & Co, West Drayton, 01895 442711, estate@rwhitley.co.uk - Fairly responsive market, but, very price sensitive.

Robert Green MRICS, John D Wood & Co., Chelsea, 020 7352 1484 - Activity picked up in recent weeks for new instructions and properties where prices have been reduced to match market conditions. Buyers are now willing to commit in great numbers. We have seen competitive bidding on realistically priced property.

Simon Aldous MRICS, Savills, London, 02070163861, saldous@savills.com - There are downward pressures across all prime London markets. We have already seen so far price falls of around 5% this year, we believe this is going to continue through to the end of this year. There are a lot more properties on the market.

## Scotland

Adrian Stott FRICS, J and E Shepherd, Lothians, 01316533456, a.stott@shepherd.co.uk - Market appears to have settled somewhat after Brexit but some uncertainty now with regards to the possibility of a second referendum.

Alexander Inglis MRICS, CKD Galbraith, Scottish Borders, 01573 224 244, alex.inglis@ckdgalbraith.co.uk - The market remains encouraging although some sellers are now deciding to delay things until next spring.

Chris Hall MRICS, Rettie and Co, Edinburgh, 0131 220 4160, chris.hall@rettie.co.uk - Urban sales below £500k strong with a lack of supply an issue. Rural sales slower and in excess of £500k LBTT rates and the second home supplement still having a significant adverse effect on market.

Craig Henderson MRICS, Graham + Sibbald, Glasgow/West Scotland, 0141 332 1194, craig.henderson@g-s.co.uk - Agents report existing stock is selling well, but struggling to get new vendor's to come to the market, seen by lower levels of new Home Report instructions in the last month or so.

David Ward AssocRICS, Harvey Donaldson and Gibson, Glasgow, david.ward@hdg.co.uk - Normal seasonal slowdown around Christmas expected.

Gavin Miller MRICS, Graham + Sibbald, Stirling, 01786 463111, gavin.miller@g-s.co.uk - Properties are performing well in a market where there is a lack of new stock coming on to the market.

Gordon Macdonald FRICS, Allied Surveyors Scotland, Aberdeen/Aberdeenshire, 01224 571163, gordon.macdonald@alliedsurveyorsscotland.com - Oil industry matters continue to have a depressive effect on the market as a whole, with the greater effect being felt as one travels farther from the city. However, sellers are showing signs of being more realistic and activity continues.

Grant Robertson MRICS, Allied Surveyors, Glasgow, 0141 330 9950 - Continuing low supply allied to historically low interest rates is driving sale prices up and valuations on Home Reports are struggling to keep up. 5-10% over H/R not uncommon.

Greg Davidson MRICS, Graham + Sibbald, Perth, 01738 445733, gdavidson@g-s.co.uk - The mainstream market seems to be performing as normal but political uncertainty and policies are having a negative impact on the Scottish prime country markets particularly above £500k.

Ian Morton MRICS RICS Registered Valuer, Bradburne & Co, St Andrews, 01334 479479, ian@bradburne.co.uk - Steady stream of buyers looking, but fewer properties coming to the market for sale. Sales have started to move over the summer months.

Kevin Hay BSc MRICS, Allied Surveyors, Ayr, 01292 265381 - Lack of stock coming to the market.

Kevin MacDonald MRICS, Graham + Sibbald, Inverness, 01463 236977, kmacdonald@g-s.co.uk - The market is showing signs of slowing in terms of new stock coming up for sale. Properties which are available still generate a healthy level of interest with strong demand and good prices paid for family homes in sought after locations.

Marion Currie AssocRICS Registered Valuer, CKD Galbraith, Dumfries & Galloway, 01556 505346, marion.currie@ckdgalbraith.co.uk - Good number of instructions still coming in, with sales and buyer enquiries remaining steady. Expect this will dip once half terms are over by the end of October.

Martin Douglas MRICS, Graham + Sibbald, Hamilton, 01698422500, martin.douglas@g-s.co.uk - The lack of supply within the main Lanarkshire towns has resulted in a higher number of properties going to closing date and achieving on or above Home Report values.

Martin Douglas MRICS, Graham + Sibbald, Hamilton, 01698422500, martin.douglas@g-s.co.uk - The month of September has been erratic with no real consistency in the volume of instructions. Demand for property remains high in the main Lanarkshire towns with a number of properties selling at or above Home Report values.

Pamela Morrison, Strutt & Parker LLP, Banchory, pamela.morrison@struttandparker.com - The increase in LBTT in Scotland and the local economy have had a detrimental effect on the property market around Aberdeen.

Phiddy Robertson AssocRICS, CKD Galbraith, Inverness, 01463 224343, phiddy.robertson@ckdgalbraith.co.uk - There was a post-Brexit bounce but the market seems to have reverted to being patchy. More buyers at and above £500k.

Richard R Blanski FRICS, J&E Shepherd Chartered Surveyors, Kirkcaldy, 01592 205442, kirkcaldy@shepherd.co.uk - Lack of supply continues to suppress the market and reduce the number of new listings.

Robbie Buchanan MRICS, Graham + Sibbald, Kirkcaldy, 01592266211, rbuchanan@g-s.co.uk - Demand remains steady but still a shortage of stock which has a knock on effect in the number coming to the market.

Ronald G Smith MRICS, J & E Shepherd, East Dunbartonshire/North Lanarkshire, 01236 780000, ronnie.smith@shepherd.co.uk - Low stock levels a continuing key factor in producing some eyebrow raising sale prices.

Thomas Baird MRICS, Select Surveyors Ltd, Glasgow, 0141 632 6589, reception@selectsurveyors.co.uk - Slowdown in Home Report instructions for the month of September indicative of lack of housing stock coming to the market.

## Northern Ireland

Eoin Lawless FRICS, Eoin Lawless Estate Agents, Warrenpoint, info@lawlessestateagent.co.uk - With the summer holiday period ending there is an increase in market activity as well as new vendor instructions.

Gareth Gibson FRICS, Douglas Huston, Belfast, 02890683711, gareth@hustonestateagents.com - Supply levels seem to be continuing to drop.

Kirby O'Connor AssocRICS, GOC Estate Agents Ltd, Belfast, 02890662366, kirby@gocestateagents.com - The market has pockets of strong values, high demand for turnkey modern homes and clients are willing to pay for this.

## Surveyor comments - sales

Samuel Dickey MRICS, Simon Brien Residential, Belfast, 02890428989, sdickey@simonbrien.com - Sales across the board are doing well if priced correctly.

Stephen Fitzpatrick MRICS, Stephen Fitzpatrick Estd.1881, Newry Co.Down, 02830265533, info@stephenfitzpatrick.co.uk - It is customary for the housing market to ease up to and over the Christmas period.

# Surveyor comments - lettings

## North

Douglas B. Farmer MRICS, Hopes Estate Agents, Wigton, 016973-43641, douglasbfarmer@gmail.com - In view of the uncertain sales market in our area, the lettings market is proving more buoyant with demand and supply probably equally balanced.

John Reeves FRICS, Helmsley group Ltd, York, 01904 682800, john-reeves@helmsley.co.uk - Very busy.

Keith Pattinson FRICS, Keith Pattinson Ltd, Newcastle upon Tyne, 07770602155, keith.pattinson@pattinson.co.uk - Steady supply and demand.

Mr T H Brannen FRICS, Brannen & Partners, Coastal / Newcastle, 0191 2517878, shaun.brannen@brannen-partners.co.uk - Many 'small' investor landlords are now withdrawing from the market and selling up which is compounding the misery for tenants as the supply is diminishing.

Neil Foster BSc (Hons) MRICS, Foster Maddison Property Consultants, Newcastle upon Tyne, 0191 281 8339, neil.foster@fostermaddison.co.uk - Landlords are inevitably squeezing rents higher in anticipation of tax increases.

## Yorkshire and Humber

Alex McNeil MRICS, Bramleys, Huddersfield, 01484 530361, alex.mcneil@bramleys1.co.uk - Yields continue to be maintained as there has been a sustained period of modest rental growth and, with a shortage of available rental stock, it is hard to see how rents cannot increase over the next twelve months.

Ben Hudson MRICS, Hudson Moody, York, 01904 650650, benhudson@hudson-moody.com - Lack of stock driving up rents.

Chris Clubley FRICS CAAV, Chris Clubley & Co., Market Weighton, 01430 874000 - Lettings remains strong. Busy with new instructions and tenant demand still high.

Christopher Evans FRICS, Haller Evans, Hull, 01482 323033 - There is reasonable demand for most properties and generally short void periods.

Christopher R Jowett BSc MRICS, Jowett Chartered Surveyors, Huddersfield, 01484 536799, chris@jowett-huddersfield.co.uk - Tenant demand strong for any decent quality property.

Ian Adams MRICS, Metropolis Surveyors, Kingston upon Hull, ianadams31@yahoo.co.uk - It has to be predicted that tenant demand will stabilise following Brexit.

John E Haigh MRICS FAAV, Lister Haigh (Knaresborough) Limited, Knaresborough, 01423 860322, knaresborough@listerhaigh.co.uk - Supply of houses to rent is increasing as tenants take the opportunity to buy a newly built house and purchase incentives that go with them.

Nicholas Atkin FRICS, Ulyotts, Driffeld East Yorkshire, 01377 253456, nma@ullyotts.co.uk - Ongoing steady demand.

Pete Shield FRICS, Shield Estates UK Limited, Sheffield, 0114 2571000, peter.shield@shieldgroup.uk.com - Still a steady market for well-presented properties of all kinds. There seems to be a trend for younger potential tenants seeking accommodation.

Peter Green FRICS, Brearley-Greens, Halifax, 01422 330088, enq@brearley-greens.co.uk - Unlike sales, fairly constant and busy throughout the year, possibly adversely effected for 2 or 3 weeks around Christmas.

Steven Kontou MRICS, SK Estate Agents, Sheffield, 0114 2749730, steven@skstateagents.co.uk - More landlords are selling because of the stamp duty increase and other negative government policies targeting landlords. This will ultimately drive up rents.

## North West

Ian Fox AssocRICS, Sselect Homes, Liverpool, 0151 722 9707, ian.fox@sselect-homes.co.uk - The lettings market continues to remain very strong in the region. Buy-to-let investors do not appear to have been put off by recent tax changes. Liverpool as a whole is proving to be a good place to invest.

John Halman FRICS, Gascoigne Halman, Wilmslow, jhalman@gascoignehalman.co.uk - Still buoyant. Lots of property available across the board.

## East Midlands

Alastair Boulton MRICS, Robert Bell & Company, Horncastle, 01507 522222, alastairboulton@robert-bell.org - Increasing regulation is constraining the market.

Andrew York FRICS, Moore & York, Leicester, 0116 2558666 - Demand still very strong.

Charlotte Crosby MRICS, Shouler & Son, Melton Mowbray, 01664 410 166, c.crosby@shoulers.co.uk - We are beginning to feel the effect of April's increase in stamp duty for BTL investors.

Christopher Shallice FRICS FAAV, Hix & Son, Holbeach, 01406 422 777 - Good demand for well-presented properties.

D P Hammond BSc FRICS, David Hammond Chartered Surveyors, Nottinghamshire, 01773 533666, mail@dvdhammond.co.uk - Continued buoyant demand in September. Additional stock beginning to come to the market.

David Moore MRICS, Harwoods, Wellingborough, 01933441464, david@harwoodsproperty.co.uk - Landlords are expressing concern at buy-to-let changes with some choosing to sell parts of their portfolio.

John Chappell MRICS, Property Office, Skegness, 01754 763520 - Landlords currently refusing new housing benefit applicants as the District Council is quoting "several months" to process claims.

Jonathan Harvey BSc (Hons) MRICS, Lifestyle Homes, Melton Mowbray, harvey2share@hotmail.com - Greater demand in higher end lettings.

Marcus Linsey BSc (Hons) MSc MRICS, Auction House Copelands, Chesterfield, 01246 232698, msl@copelands-uk.co.uk - Lettings market is very strong and continues to grow due to lack of housing supply.

Martin Pendered FRICS, Martin Pendered & Co Ltd, Wellingborough, 01933 228822, mpendered@martinpendered.co.uk - Demand still exceeds supply across the board. Some landlords are selling but most see investment in property as the best return available. Some new investors coming on the scene.

Nicholas Richardson FRICS, Nicholas Richardsons, Beeston/Nottingham, 0115 96 77589 - We are obtaining higher rents, and better quality tenants. The shortage of houses to buy is forcing more people to rent. I need more 3 bedroomed houses.

Peter Buckingham, Andrew Granger & Co, Market Harborough, 01858 431315, peter.buckingham@andrewgranger.co.uk - Demand for rental property outweighing supply, strong demand in all price brackets.

Rebecca Bulmer AssocRICS, Bulmer Estates Ltd, Nottingham, 0115 969 6111, rebecca@bulmerestates.co.uk - Demand continues to outstrip demand, with multiple applications received for properties. A marked increase in demand from housing benefit tenants for properties.

Will Ravenhill MNAEA MARLA, Readings, Leicester, wravenhill@readingspropertygroup.com - There was plenty of available stock going into the summer, but this has now been let and available stock at a historic low for us.

# Surveyor comments - lettings

## West Midlands

Andrew Grant FRICS, Andrew Grant LLP, Worcester, 007976982742, dcass@andrew-grant.co.uk - A steady supply and demand.

Andrew Pearce MRICS, Millennium Properties, Wolverhampton, 01902 836036 - More demand than supply hence rents rising.

Colin Townsend MRICS, John Goodwin, Malvern, 01684 892809, colin@johngoodwin.co.uk - Still a shortage of new instructions and very high demand. Rents will continue to rise.

Dean Taylor MRICS, Fishers, Harborne/Birmingham, 0121 4281000, dt@fishers.co.uk - We still have a limited supply of good quality properties to offer potential tenants. Tenant demand appears to still be pretty strong.

J J Dell MRICS FAVV, J J Dell & CO, Oswestry, 01691 653437, property@jydell.co.uk - High demand for rentals, but very slow on instructions, tenants seem to be staying put.

Jennifer Price FRICS, Harrison Price Homes, Birmingham, jennifer@harrisonpricehomes.co.uk - Very busy tenant demand, not showing any sign of subsiding.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, 01562 821600 - A busy start to autumn with applications being received for all types of rented properties in this area. Rents likely to rise further.

John Andrews FRICS IRRV, Doolittle & Dalley, Bridgnorth, 01562 821600 - A key buoyant market with few new properties becoming available to let and multiple applications for most properties. Buy-to-let investors merging anticipating low bank interest rates.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, 01562 821600 - Steady and constant demand for all types of properties. Although rented accommodation is well supplied, there is a shortage of 2 and 3 bedroomed houses to let for which demand is good.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, 01562 821600 - A very buoyant market with properties letting well and a shortage of new instructions. Rents are likely to increase unless there is a greater volume of properties available to rent.

John Ozwell FRICS, Hunters, Solihull, 01564 771000 - Steady market - consistent demand.

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

Nicholas Lamb MRICS, Naismiths, Birmingham, Nicholas.lamb@naismiths.com - Demand is definitely up which is to be expected at this time of year, with many looking to secure occupation before Christmas. There is still limited supply of good quality properly managed stock however.

Paula Tinsley, Whittaker & Biggs, Biddulph, paula.tinsley@whittakerandbiggs.co.uk - Lack of buy-to-let investors since stamp duty changes.

Richard Franklin BSc (Hons) MRICS, Franklin Gallimore, Tenbury Wells, 01584 810436 - Michaelmas' is traditionally a time for moving in rural areas. Applicants are up and good, clean and well-priced rentals are going very quickly.

Ryan Williams FRICS, McCartneys, Hay-on-Wye, 01497 820 778, ryan@mccartneys.co.uk - Steady supply and demand. Rent Smart Wales causing some concern amongst self-managing landlords on the Welsh side of the border.

Stephen Barber, Countrywide Residential Lettings, Stafford, 01785 212112 - Has been strong demand over the past two months.

Stephen Smith MRICS, Fraser Wood, Walsall, 01922 629000 - Demand remains strong for good quality properties.

## East Anglia

J Darrell MRICS, Dudley Bros., Norfolk, dudleybro@aol.com - The usual marital upheavals account for perhaps 20% of enquiries.

Jan Hytch FRICS, Arnolds, Norwich, 01603 620551 - In light of the increased stamp duty, there are fewer new landlords for new properties coming to the market. Demand is high.

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

Nigel Steele FRICS, Jackson-Stops & Staff, Norfolk, 01603 612333, nigel.steele@jackson-stops.co.uk - The market seems to be slowing.

W J Hartnell FRICS, Simon Matthew & Co., Ingatstone, 01277 355255 - Same.

## South East

Alistair Fell APC Candidate, Strutt and Parker LLP, Canterbury, alistair.fell@struttandparker.com - The market has been busier in recent weeks with people wanting to find homes ahead of school terms starting. Demand is expected to lessen as we approach the winter months toward Christmas.

Anthony Jamieson MRICS, Clarke Gammon Wellers, Guildford, 01483 880905 - Still good market with good tenancies but a lack of properties for rent.

Charles Bramly MRICS, Stiles Harold Williams, Eastbourne, cbramly@shw.co.uk - The increasing obligations will hopefully force management and letting work into the hands of responsible agents.

Clive Rutland FRICS, Moses Rutland, Southampton, 023 8066 3451, totton@mosesrutland.com - Rents still rising but more slowly. Still a good supply of tenants but slightly fewer lettings available.

Colin Bernhardt BSc FRICS, Bernhardt Associates LLP, Bognor Regis, bernhardt.assoc@btconnect.com - Over demand - under supply pushing up rents.

David Parish FRICS, Gates Parish & Co., Upton, 01708 250033 - Too much government regulation and stamp duty increases are discouraging potential buy-to-let landlords. The government needs to help and encourage potential landlords to improve the supply of rented accommodation.

Glen Crump AssocRICS, LSL Land & New Homes, Southampton, gcrumpy@hotmail.com - There just isn't enough rental properties for a mass demand.

James Farrance MNAEA, FARLA, Braxton, Maidenhead, 01628 674234, jfarrance@braxtons.co.uk - Interest from tenants remains strong.

James Scott-Lee FRICS, The Chancellors Group of Estate Agents Ltd, West London/Home Counties/Herefordshire and Powis, 01344408100, james.scott-lee@chancellors.co.uk - Busy summer as expected due to flat sales market.

John Frost MRICS, The Frost Partnership, Amersham, 01494 680909, beaconsfield@frostsurveyors.co.uk - High stock levels. Good buyer enquiries and price reductions having an effect.

John Frost MRICS, The Frost Partnership, Gerrards Cross, 01494 680909, beaconsfield@frostsurveyors.co.uk - Low levels of stock.

Martin Allen MRICS, Elgars/Wingham/Canterbury, 01227 720557, m.allen@elgars.uk.com - Shortage of supply still putting upward pressure on rents.



# Surveyor comments - lettings

Martin Lee MRICS, Countrywide Surveyors, Southend on Sea, martin.lee@cwsurveyors.co.uk - Interest rates.

Michael Brooker FRICS, Michael Brooker Estate Agents, Crowborough, 01892 663377 - Constant demand. Concern at percentage of income by way of rent. Busy.

N C Pilgrim MRICS, Pilgrim Bond, Lambourn/Berkshire, 01488 72911, craig@pilgrimbond.co.uk - Rental demand continues to grow with house purchasing becoming more difficult at the lower end of the market due to difficulties in getting mortgages.

Paul Coutts FRICS, The Livemore Partnership, Southend on Sea, paul.coutts22@gmail.com - Scarcity of properties a major factor in price/rent increases.

Philip Newman MRICS, Chartered Valuation Surveyor, Nationwide Building Society, South Hampshire, 07887830021, philip.newman@nationwide.co.uk - There is still evidence that some landlords are selling up due to the tax changes announced earlier in the year but tenant demand is still high.

Rowland Mecklenburgh FRICS, LP and M, 01923255888, rowland@plandm.co.uk - Shortage of property still propping up rental levels.

Stuart Gray MRICS FAAV, Strutt & Parker LLP, St Albans, 01727 840285, stuart.gray@struttandparker.com - A typically slow summer period but encouraging activity in the market so far in September.

Tom White MRICS, Audley End Estate, Saffron Walden, tom.white@audleyendestate.co.uk - The start of the academic year after a post-Brexit vote lull and a quiet summer holiday has prompted some activity. Good quality and location let very swiftly.

Yvonne Cox, Freeman Forman Letting, Heathfield, 01435 862766, yvonne.cox@countrywide.co.uk - Demand still strong and more properties are starting to come through.

## South West

Chris Philpot FRICS, Lacy Scott and Knight, Stowmarket/Suffolk, cphilpot@lsc.co.uk - There is still much activity, but with fewer new landlords arriving, because of the combined extra stamp duty and expected loss of tax relief.

John Corben FRICS FCIARB, Corbens, Swanage, 01929 422284, john@corbens.co.uk - Lettings market continues with strong levels of demand. Shortage of supply is the problem.

Laurence APC Candidate, Rige, Berkshire, prm90201@myport.ac.uk - With students arriving, rental prices have recently increased.

Mark Annett FRICS, Mark Annett and Company, Chipping Campden, 01386 841622 - Demand remains strong from tenants. We could do with more properties to rent out.

Matthew Harvey MRICS, Tayler and Fletcher, Bourton on the Water, matthew.harvey@taylerandfletcher.co.uk - Demand remains strong and supply limited.

Paul Oughton MARLA MNAEA, Moore Allen & Innocent, Cirecester & The Cotswolds, lettings@mooreallen.co.uk - Property supply tightening with strong applicant demand going unsatisfied.

Simon Cooper FRICS, Stags, Exeter, 01392 255202, s.cooper@stags.co.uk - September continued strongly with a shortage of properties to let. Very few BTL investors have left the market place and indeed there are more people looking to invest in residential properties.

## Wales

Anthony Filice FRICS, Kelvin Francis, Cardiff, 02920766538, tony@kelvinfrancis.com - Steady flow of instructions from new and existing landlords, with continued strong demand from tenants. Rental market looks promising for the next quarter.

Caroline Jones MRICS, Bruton Knowles, Cardiff, caroline.jones@brutonknowles.co.uk - Stamp duty for second homes.

David Owen Evans FRICS, Clare Evans & Co, Rhayader, 01597 810457, clare.evans@clareevansandco.co.uk - Demand for rental property continues to outstrip supply.

Iwan Jones, Dafydd Hardy Estate Agents, Llangefni, 01248 723322, iwanjones@dafyddhardy.co.uk - With the introduction of Rent Smart Wales we have seen a slight increase in new landlords coming to us to manage their properties, however most have embraced the Act.

John Caines FRICS, Payton Jewell Caines, Bridgend, 01656 654328 - In Wales the registration deadline for Rent Smart Wales will impact the market. The results of which will be more clear after the 1st/2nd quarter 2017.

Paul Lucas FRICS, R.K. Lucas & Son, Haverfordwest, 01437762538, paul@rklucas.co.uk - Lettings are variable. Housing Associations are becoming more active in the affordable homes market which is having a negative effect on the private lettings market.

## London

Angela Kelly MRICS, Hurford Salvi Carr, City of London, 02074901122, angela.kelly@h-s-c.co.uk - We are aware that the City has culled its graduate job offers which has somewhat suppressed seasonal demand in a tough market, but we are seeing green shoots of recovery.

Benjamin JC Mire BSc (Est Man) FRICS, Trust Property Management, Colindale, London NW9, 02083586565, bmire@trustplc.com - The market remains very buoyant in our area, due in the main to shortage of supply matching demand, notwithstanding the huge volume of additional units under construction, which are primarily under construction rather than on stream as yet.

Ian J Fergusson BSc FRICS, SBVS, London/UK, ian.fergusson@sbvals.co.uk - Limited supply keeping rents high.

James Gubbins MRICS, Dauntons, Pimlico, 020 7834 8000, mail@dauntons.co.uk - A lack of good quality applicants. Rents are holding at current levels though landlords may negotiate with renewing tenants to hold on to good ones.

Jeffrey Doble MRICS, Thamesview (Incl Dexters Estate Agents), Teddington, 020 8614 1230 - Very busy indeed, plenty of property and tenants.

Jeremy Leaf FRICS, Jeremy Leaf & Co, Finchley, jeremy@jeremyleaf.co.uk - In September we actually received too much stock resulting in a tenants' market and softening of rents which is surprising as we're usually busier at this time of year.

Jilly Bland MRICS John Collard, Robert Holmes & Co, Wimbledon, 0208 879 9669, jilly@robertholmes.co.uk - There is a saturation of supply far outweighing demand after the stamp duty and Brexit.

John King FRICS, Andrew Scott Robertson, Merton, 020 8971 6780, jking@as-r.co.uk - Good activity towards the bottom end of the market ie £1200/£1500 price bracket but little over this level at present.

John King FRICS, Andrew Scott Robertson, Wimbledon, 020 8971 6780, jking@as-r.co.uk - Instruction levels are improving week on week but actual lettings are happening at a slower pace.

# Surveyor comments - lettings

Jonathan Price AssocRICS, Southside Property Management Services LTD, Bromley, 0330 999 1612, jonathan@southside-property.co.uk - Lettings will not be effected in the same way as sales by macro/government factors, but will remain influenced by traditional factors such as Christmas periods and summer holidays.

Mark Wilson, MRICS, London, 020 7935 9512, mark@globeapt.com - I can't help feeling gloomy. The past week has been very quiet. Yields are set to fall.

Nieves Muros, Cluttons, Marylebone - Hyde Park, nieves.muros@cluttons.com - Lower demand, especially for big units and relocations.

Paul L Whitley FNAEA MARLA, R Whitley & Co, West Drayton, 01895 442711, estate@rwhitley.co.uk - Good number of lettings achieved during the month, but, has slowed down considerably as the month drew to a close.

Simon Aldous MRICS, Savills, London, 02070163861, saldous@savills.com - Rents have come down with more stock being transferred from the sales market.

Will Barnes Yallowley AssoRICS, LHH Residential LLP, Kensington, 02073762286, will@lhhresidential.co.uk - We have had a flurry of letting activity but applicants are savvy, aware of the oversupply, and putting in low offers.

## Scotland

Carolyn Davies MRICS, Savills, Dumfries, 01387 263066, cmadavies@savills.com - Closeness of property to employment locations driving the majority of lettings, due to commuting costs. Continued demand for good quality rural properties.

Gordon Macdonald FRICS, Allied Surveyors Scotland, Aberdeen/Aberdeenshire, 01224 571163, gordon.macdonald@alliedsurveyorsscotland.com - More availability is reducing rents, particularly for larger properties.

Grant Robertson MRICS, Allied Surveyors, Glasgow, 0141 330 9950 - "Accidental" landlords are exiting the market leaving reduced stock and rents, particularly for 1 & 2 properties, are rising sharply.

Ian Morton MRICS RICS Registered Valuer, Bradburne & Co, St Andrews, 01334 479479, ian@bradburne.co.uk - Demand from tenants continues but supply of suitable rental properties is low.

John Gell MRICS, Simply Let, Inverness, 01463 718888, john.gell@simplylet.biz - Tenant demand has slackened during September, leading to increased risk of voids. New landlord instructions continue to accrue. This may put downward pressure on rents but no there is evidence of this to date.

Neil Woodhead FRICS, Castle Estates, Inverclyde, 01475784781, neil@castle-estates.com - Strong demand for good properties. Highest demand from over 40+ age group.

## Northern Ireland

Eoin Lawless FRICS, Eoin Lawless Estate Agents, Warrenpoint, info@lawlessestateagent.co.uk - Lack of supply of local lettings.

Gareth Gibson FRICS, Douglas Huston, Belfast, 02890683711, gareth@hustonestateagents.com - The busy summer lettings season is now drawing to a conclusion, supply levels dropping with demand remaining strong.

H Rountree AssocRICS, MacFarlane & Smyth, Belfast, heather.rountree@macfarlanesmyth.com - There are certainly calendar effects on the letting market. Student lettings being very attractive Feb, March, April, slowing down due to exams and end of university year.

Kirby O'Connor AssocRICS, GOC Estate Agents Ltd, Belfast, 02890662366, kirby@gocestateagents.com - Rental market is very strong, huge demand for 2 bedrooms and 3 bedrooms. Turnaround seems to be within a week.

Samuel Dickey MRICS, Simon Brien Residential, Belfast, 02890428989, sdickey@simonbrien.com - Rental demand is strong.

Stephen Fitzpatrick MRICS, Stephen Fitzpatrick Estd.1881, Newry Co.Down, 02830265533, info@stephenfitzpatrick.co.uk - Lettings remain fairly constant.

# Surveyor contact details

## North

Aimee Thompson, Edwin Thompson, Keswick, 017687 72988, a.thompson@edwin-thompson.co.uk

Andrew Holmes MRICS, Thomson Hayton Winkley Estate Agents, South Lakeland, achh@thwestateagents.co.uk

Chris Dodds, Gleeson Homes, County Durham, cdodds@mjgleeson.com

Chris Stonock MRICS, Your Move Chris Stonock, Chester Le Street Co Durham, christopher.stonock@your-move.co.uk

Dan Maddison MRICS, Foster Maddison Property Consultants, Hexham, dan.maddison@fostermaddison.co.uk

Douglas B. Farmer MRICS, Hopes Estate Agents, Wigton, 016973-43641, douglasbfarmer@gmail.com

John Reeves FRICS, Helmsley group Ltd, York, 01904 682800, john-reeves@helmsley.co.uk

Keith Johnson FRICS, J W Wood, Durham, 01913869921, g.graham@jww.co.uk

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

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

Neil Foster BSc (Hons) MRICS, Foster Maddison Property Consultants, Newcastle upon Tyne, 0191 281 8339, neil.foster@fostermaddison.co.uk

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

Richard Harkness MRICS, Hackney & Leigh, Kirkby Lonsdale, 015242 72111, richardharkness@hackney-leigh.co.uk

Richard Henderson MRICS FAAV, Addisons Chartered Surveyors, Crook, 01388 766676, richard.henderson@addisons-surveyors.co.uk

Richard Towler MRICS, Eden Lettings & Management, Penrith, 01768899421, enquiries@edenletting.co.uk

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

## Yorkshire & Humberside

A Ramshaw MRICS, Leeds, ashlingd@live.co.uk

Alex McNeil MRICS, Bramleys, Huddersfield, 01484 530361, alex.mcneil@bramleys1.co.uk

Andrew Blackley MRICS, Bentley Higgs, Lytham St Annes, andrew@bentleyhiggs.com

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

Andrew Watson FRICS, Colleys, Leeds, andrewwatson@halifax.co.uk

Ben Hudson MRICS, Hudson Moody, York, 01904 650650, benhudson@hudson-moody.com

Chris Clubley FRICS CAAV, Chris Clubley & Co., Market Weighton, 01430 874000

Christopher Evans FRICS, Haller Evans, Hull, 01482 323033

Christopher R Jowett BSc MRICS, Jowett Chartered Surveyors, Huddersfield, 01484 536799, chris@jowett-huddersfield.co.uk

D Blagden FRICS, eSurv Chartered Surveyors, Harrogate, 01423 531696, david.blagden@esurv.co.uk

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

David Pank FRICS, Manning Stainton, Leeds/ Wakefield, 0113 2582657, dp@manningstainton.co.uk

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

Duncan Skilton, Bridgfords Lettings, Middlesbrough, duncanskilton@bridgfords.co.uk

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

Ian Adams MRICS, Metropolis Surveyors, Kingston upon Hull, ianadams31@yahoo.co.uk

Ian Fox AssocRICS, Sselect Homes, Liverpool, 0151 722 9707, ian.fox@sselect-homes.co.uk

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

J Robinson, Whittaker & Biggs, Congleton, jwr@whittakerandbiggs.co.uk

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

Jo Bond MRICS, Davis and Bowring, South Lakes, jo.bond@davis-bowring.co.uk

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

John Halman FRICS, Gascoigne Halman, Wilmslow, jhalman@gascoignehalman.co.uk

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

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

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

M J Hunter MRICS, Grice and Hunter, Doncaster, 01302 360141, griceandhunter@btconnect.com

Martin Dennis, Jackson, Green & Preston, Grimsby, martin.dennis@jacksongreenpreston.co.uk

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

Mike Darwin MRICS, M W Darwin & Sons, Northallerton, 01609 773567, enquiries@darwin-homes.co.uk

Nicholas Atkin FRICS, Ulyotts, Driffield East Yorkshire, 01377 253456, nma@ulyotts.co.uk

## North West

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

Peter Green FRICS, Brearley-Greens, Halifax, 01422 330088, enq@brearley-greens.co.uk

Peter Lawton FRICS, Peter Lawton Chartered Surveyor, Chadderton/ Oldham, peterjlawton@aol.com

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

Philip Baddeley FRICS, Baddeleys, Lancaster, hello@baddeleys.com

Philip S Mills MRICS, Norman F Brown, Bedale, 01677 422282, bedale@normanfbrown.co.uk

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

Richard Powell FRICS, Ryder & Dutton, Oldham, 0161 925 3232, rpowell@ryder-dutton.co.uk

Richard Smailes, FSS, Harrogate, richard.smailes@fssproperty.co.uk

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

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

# Surveyor contact details

Steven Kontou MRICS, SK  
Estate Agents, Sheffield,  
0114 2749730, steven@  
skestateagents.co.uk

T A Hutchinson MRICS,  
Countrywide, Warrington, ashley.  
hutchinson@cwsurveyors.co.uk

William Marshall, Adair Paxton,  
Leeds, 0113 205 4190

## East Midlands

A R Gascoine FRICS, Gascoines  
Chartered Surveyors, Southwell,  
Nottinghamshire, 01636813245,  
rachelgascoine@gascoines.co

Alastair Boulton MRICS, Robert  
Bell & Company, Horncastle,  
01507 522222, alastairboulton@  
robert-bell.org

Andrew York FRICS, Moore &  
York, Leicester, 0116 2558666

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

C Ball MRICS, Bury & Hilton,  
Buxton, 01298 27524, charles@  
buryandhilton.co.uk

Charlotte Crosby MRICS,  
Shouler & Son, Melton Mowbray,  
01664 410 166, c.crosby@  
shoulers.co.uk

Chris Beale MRICS, Legal and  
General Surveying Services,  
Nottingham, christopher.beale@  
lgsurvey.co.uk

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

Chris Charlton BSc FRICS,  
Savills, Nottingham,  
01159348020, ccharlton@savills.  
com

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

D P Hammond BSc FRICS,  
David Hammond Chartered  
Surveyors, Nottinghamshire,  
01773 533666, mail@  
dvdhammond.co.uk

Dan Elliott MRICS, Wilkins Vardy  
Residential Ltd, Chesterfield,  
01246 270123, dan@wilkins-  
vardy.co.uk

David F H Cox MRICS, Sinclair  
Estate Agents, Coalville,  
01530 838338, davidcox@  
sinclairstateagents.co.uk

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

David Moore MRICS, Harwoods,  
Wellingborough, 01933441464,  
david@harwoodsproperty.co.uk

Dean Wood FRICS, Sonas  
Surveyors, East Midlands,  
01332 693106, dean.wood@  
sonassurveyors.co.uk

Ian J Shaw FRICS, Escritt Barrel  
Golding, Grantham, ian.shaw@  
ebgproperty.co.uk

J Fairman RICS, Poyntons,  
Boston, sales@poyntons.com

John Chappell MRICS, Property  
Office, Skegness, 01754 763520

Jonathan Harvey BSc (Hons)  
MRICS, Lifestyle Homes, Melton  
Mowbray, harvey2share@  
hotmail.com

Kevin Gregory FRICS,  
GregoryResidential Ltd,  
Leicester, 0116 2789979, kevin@  
gregoryresidential.co.uk

Marcus Linsey BSc (Hons)  
MSc MRICS, Auction House  
Copelands, Chesterfield, 01246  
232698, msl@copelands-uk.  
co.uk

Marie Brear, Wilkins Hammond,  
Chesterfield, 01246232853,  
marie.brear@wilkins-hammond.  
com

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

Mark Sandall MRICS, Andrew  
Granger & Co, Leicester, mark.  
sandall@andrewgranger.co.uk

Martin Pendered FRICS,  
Martin Pendered & Co Ltd,  
Wellingborough, 01933 228822,  
mpendered@martinpendered.  
co.uk

Nicholas Richardson FRICS,  
Nicholas Richardsons, Beeston/  
Nottingham, 0115 96 77589,  
nrichardson

Nicholas Wint BSc (Hons)  
MRICS ACIRb, Johnson Fellows  
LLP, East Midlands, 0121 643  
9337

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

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

Peter Goodrick ARICS, South  
Holland District Council,  
Spalding, gooders\_leeds@  
hotmail.com

Quentin Jackson-Stops  
FRICS, Jackson-Stops & Staff,  
Northampton, 01604 632991,  
quentin.jackson-stops@jackson-  
stops.co.uk

Rebecca Bulmer AssocRICS,  
Bulmer Estates Ltd, Nottingham,  
0115 969 6111, rebecca@  
bulmerestates.co.uk

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

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

Will Ravenhill MNAEA MARLA,  
Readings, Leicester, wravenhill@  
readingspropertygroup.com

## West Midlands

Alan Metcalfe, Halls Midlands  
LLP, Worcestershire, alan.  
metcalfe@hallsworcester.com

Andrew Grant FRICS, Andrew  
Grant LLP, Worcester,  
007976982742, dcass@andrew-  
grant.co.uk

Andrew Oulsnam MRICS,  
Robert Oulsnam, Barnt Green,  
01214453311, andrew@oulsnam.  
net

Andrew Pearce MRICS,  
Millennium Properties,  
Wolverhampton, 01902 836036

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

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

Dean Taylor MRICS, Fishers,  
Harborne/Birmingham, 0121  
4281000, dt@fishers.co.uk

Ian Bullock MRICS, Carpenter  
Surveyors Ltd, Birmingham, ian.  
bullock@carpenter-surveyors.  
com

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

Jennifer Price FRICS, Harrison  
Price Homes, Birmingham,  
jennifer@harrisonpricehomes.  
co.uk

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

John Ozwell FRICS, Hunters,  
Solihull, 01564 771000

Mark Wiggin MRICS, Strutt &  
Parker, Ludlow, 01584 873711,  
mark.wiggin@struttandparker.  
com

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

Nicholas Lamb MRICS,  
Naismiths, Birmingham,  
Nicholas.lamb@naismiths.com

Nicholas Wint BSc (Hons)  
MRICS ACIRb, Johnson Fellows  
LLP, West Midlands, 0121 643  
9337

Paula Tinsley, Whittaker &  
Biggs, Biddulph, paula.tinsley@  
whittakerandbiggs.co.uk

Piers Thompson AssocRICS,  
Connells SV, Worcestershire,  
Thompsonpiers@gmail.com

Richard Franklin BSc (Hons)  
MRICS, Franklin Gallimore,  
Tenbury Wells, 01584 810436

Roger Lunt FRICS, Morris  
Marshall & Poole, Oswestry,  
roger@morrismarshall.co.uk

# Surveyor contact details

Ryan Williams FRICS,  
McCartneys, Hay-on-Wye, 01497  
820 778, ryan@mcartneys.  
co.uk

Simon Wilkinson MRICS,  
Sheldon Bosley Knight,  
Stratford upon Avon, 01789  
292310, swilkinson@  
sheldonbosleyknight.co.uk

Stephen Barber, Countrywide  
Residential Lettings, Stafford,  
01785 212112

Stephen Smith MRICS, Fraser  
Wood, Walsall, 01922 629000

Stewart Sherman MRICS,  
Chamberlains Chartered  
Surveyors, Birmingham,  
01214284290, stewart@  
chamberlainssurveyors.co.uk

## East Anglia

A E Bromley-Martin MRICS,  
Bedfords, Woodbridge, 01394  
779444, antony@bedfords.co.uk

Andrew Tucker MARLA,  
Bidwells, Cambridge, 01223  
841842, andrew.tucker@  
bidwells.co.uk

Andrew Wagstaff MRICS,  
Bedfords, Burnham Market-  
North Norfolk, 01328 730500,  
andrewwagstaff@bedfords.co.uk

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

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

J Darrell MRICS, Dudley Bros.,  
Norfolk, dudleybro@aol.com

Jan Hytch FRICS, Arnolds,  
Norwich, 01603 620551

Jeffrey Hazel FRICS, Geoffrey  
Collins & Co., Kings Lynn, 01553  
774135

Jonathan Pearson MRICS  
Registered Valuer, Residentially,  
Bury St Edmunds, jlp@  
esentially.co.uk

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

Nicholas Rudge FRICS FAAV,  
Durrants, Beccles, 01502 712122

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

Ollie Peacock MRICS, Jackson-  
Stops & Staff, Bury St Edmunds,  
01284 700535

Robert Hurst MRICS, Auction  
House, Norwich, 01603 505100,  
robert.hurst@auctionhouse.  
co.uk

Sophie Harris RICS accredited  
course, Strutt and Parker,  
Ipswich, sophie.harris@  
struttandparker.com

Tom Goodley MRICS, Strutt &  
Parker, Norfolk, 01603617431,  
tom.goodley@struttandparker.  
com

W J Hartnell FRICS, Simon  
Matthew & Co., Ingatestone,  
01277 355255

## South East

A Ramsay FRICS, Surrey,  
ar221@sky.com

Alistair Fell APC Candidate,  
Strutt and Parker LLP,  
Canterbury, alistair.fell@  
struttandparker.com

Andrew Turner AccoCRICS,  
Countrywide, London, andrew.  
turner@cwsurveyors.co.uk

Anthony Jamieson MRICS,  
Clarke Gammon Wellers,  
Guildford, 01483 880905

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

Ben Runciman MRICS, Byrne  
Runciman, Wickham, Fareham,  
runciman.ben@gmail.com

Charles Bramly MRICS, Stiles  
Harold Williams, Eastbourne,  
cbramly@shw.co.uk

Chris Gooch MRICS, Carter  
Jonas, Winchester, chris.  
gooch@carterjonas.co.uk

Christopher Beadle,  
Bairstoweves Lettings, Billericay,  
Essex, chris.beadle@crlirect.  
co.uk

Christopher Clark FRICS,  
Ely Langley Greig, Eastleigh,  
chrisclark@elgsurveyors.co.uk

Clive Rutland FRICS, Moses  
Rutland, Southampton, 023 8066  
3451, totton@mosesrutland.com

Colin Bernhardt BSc FRICS,  
Bernhardt Associates LLP,  
Bognor Regis, bernhardt.  
assoc@btconnect.com

Daniel Asekokhai AssocRICS,  
Countrywide Surveyors, South  
East, daniel.asekokhai@  
cwsurveyors.co.uk

David Bambrough FRICS,  
Connells Survey and Valuation,  
Milton Keynes, 01604 790087,  
david.bambrough@connells.  
co.uk

David Clifford-Smith MRICS,  
Beresfords, Chelmsford, dcs@  
beresfordsgroup.co.uk

David Dunwoody MRICS,  
Aitchison Raffety, London, david.  
dunwoody@argroup.co.uk

David Howe MRICS, Medway  
Council, Medway, david.howe@  
medway.gov.uk

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

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

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

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

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

Edward Robinson MRICS,  
Robinson Estate Agents,  
Maidenhead, eddie@  
robinsonestateagents.co.uk

Evan Owen-Powell MRICS,  
Owen Powell LTD, Brighton,  
op@owen-powell.com

Geoff Wright MRICS, esurv,  
East London/Urban Essex, geoff.  
wright@esurv.co.uk

Glen Crump AssocRICS,  
LSL Land & New Homes,  
Southampton, gcrumpy@  
hotmail.com

Hannah Ward, King and  
Chasemore Lettings,  
Hove, hannah.ward@  
kingchasemorecountrywide.  
co.uk

Harry Gladwin MRICS, Knight  
Frank, Oxford, harrygladwin@  
gmail.com

Ian Jones MRICS, Ian Jones,  
Guildford, Surrey, 01483 200465,  
cornerstonesurrey@hotmail.  
co.uk

Ian Perry FRICS, Perry Bishop  
and Chambers, Faringdon  
Lechlade/Wantage/Witney/  
Highworth, 01285 655355,  
ianperry@perrybishop.co.uk

James Collins MRICS, Collins  
Homes Ltd, Stansted, jim@  
grevilleconstruction.co.uk

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

James Dawson MRICS,  
Jackson-Stops, Newbury, 01635  
45501, james.dawson@jackson-  
stops.co.uk

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

James Scott-Lee FRICS, The  
Chancellors Group of Estate  
Agents Ltd, West London/Home  
Counties/Herefordshire and  
Powis, 01344408100, james.  
scott-lee@chancellors.co.uk

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

# Surveyor contact details

John White MRICS, CBW Surveyors Limited, Milton Keynes, info@cbwsurveyors.com

Jonathan Bastable BSc MRICS, Strutt & Parker, Newbury, 01635 521707

Joshua Fish MRICS, Strutt & Parker LLP, Lewes, joshua.fish@struttandparker.com

Kevin Townsend MRICS, Jim Townsend & Company, Reading, kevanbilly@talk21.com

Kevin Waldron AssocRICS, Kevin Waldron Property Surveyor, Oxfordshire, kevinwaldron\_propertysurveyor@btinternet.com

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

Marcus Monger, Sibley Pares, Maidstone, 01622 692206, marcus@sibleypares.co.uk

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

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

Martin Seymour BSc FRICS, Crow Watkin, Reigate, 01737 245886

Matthew Harris, Harris Associates (Kent) Ltd, New Romney, harrisassociates@talktalk.net

Michael Brooker FRICS, Michael Brooker Estate Agents, Crowborough, 01892 663377

Michael Keilthy, Parsons Son and Basley, Brighton, michaelkeilthy@psandb.co.uk

Mike Hewson FRICS, Howard Cundey, Lingfield, 01342 833333, mikehewson@howardcundey.com

Mike Saunders AssocRICS, Countrywide Surveyors, Guildford, mike.saunders@countrywide.co.uk

N C Pilgrim MRICS, Pilgrim Bond, Lambourn/Berkshire, 01488 72911, craig@pilgrimbond.co.uk

Natalie Meech, Countrywide Residential Lettings, Oxford, 01865 477059

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

P T Foster FRICS IRRV, Porter Glenny, Thurrock, 01375 374444, leigh@porterglenny.co.uk

Parisima Sayfimehr MRICS, Countrywide, Oxford, parisima.sayfimehr@cwsurveyors.co.uk

Paul Coutts FRICS, The Livemore Partnership, Southend on Sea, paul.coutts22@gmail.com

Paul Rayden MRICS, RCP Group Ltd, London, paul.rayden@rcpgroup.co.uk

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

Philip Newman MRICS, Chartered Valuation Surveyor, Nationwide Building Society, South Hampshire, 07887830021, philip.newman@nationwide.co.uk

Rebecca Overton, Michael Graham Lettings, Newport Pagnell, 01908 218850

Rhys Costello AssocRICS, Countrywide, London, rhys.costello@cwsurveyors.co.uk

Richard Gilbert FRICS, Formerly White & Sons, Dorking, rjmdg73@hotmail.com

Rob Cummins Associate, Radian, Woking, rob.cummins@radian.co.uk

Rob Swiney MRICS, Lacy Scott and Knight, Bury St Edmunds, 01284 748636, rswiney@lsc.co.uk

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

Robert Green MRICS, John D Wood & Co., Lymington, 020 7352 1484

Roderick Baker FRICS, Fell Reynolds, Folkestone, 01303 850125

Rowland Mecklenburgh FRICS, LP and M, 01923255888, rowland@plandm.co.uk

Rupert Dalbertanson AssocRICS, Countrywide Surveyors, Maidstone, kent, Rupert.dalbertanson@cwsurveyors.co.uk

Russell Gooden, Jackson Stops, Teddington, russellgooden@jacksonstops.com

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

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

Simon Randall, Carter Jonas, Basingstoke, 01256 473388, simon.randall@carterjonas.co.uk

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

Stuart Gray MRICS FAAV, Strutt & Parker LLP, St Albans, 01727 840285, stuart.gray@struttandparker.com

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

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

William Leschallas MRICS, Jackson-Stops & Staff, Burford, 01993822661, william.leschallas@jackson-stops.co.uk

Yvonne Cox, Freeman Forman Letting, Heathfield, 01435 862766, yvonne.cox@countrywide.co.uk

## South West

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

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

Chris Philpot FRICS, Lacy Scott and Knight, Stowmarket/Suffolk, cphilpot@lsc.co.uk

Christopher Bailey MRICS, Knight Frank, Exeter, 01392 423111

David Harrison FRICS, HarrisonSurveyors Ltd, Taunton, harrisons@sloughfarm.com

David Lewis BSc(Hons), Stags Estate Agents, South West Devon/East Cornwall, 01752 223933, d.lewis@stags.co.uk

David MacKenzie, Carter Jonas, Bath, 01225 747250

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

David Rogers MRICS, PureSurveys, Swindon, 97471655114, davidian46@gmail.com

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

David Wilson, Taylors Countrywide Lettings, Swindon, 01793 88 21 21, david.wilson@taylorscountrywide.co.uk

Gary Hooper FRICS, LSH, Exeter, ghooper@lsh.co.uk

GC Thorne FRICS, Thornes with Fisks, East Dorset, 01202-684004, graham@thornes.org.uk

Giles Hetherington FRICS, Hetheringtons, Mid Devon, 01398 351360, gileshetherington1@gmail.com

Gill Winfield MRICS, Winfields Chartered Surveyors, Torquay, 01803 312502, gill.winfield@winfields.uk.com

Hannah Isaacs, Mayfair Town & Country, Taunton, 01823 354242

Ian Perry FRICS, Perry Bishop and Chambers, Cheltenham/Cirencester/Nailsworth/Stroud/Tetbury, 01285 655355, ianperry@perrybishop.co.uk

# Surveyor contact details

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

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

Jeremy Priestley FRICS, Berkeleys, Poole, jeremy.priestley@yougroup.co.uk

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

John Corben FRICS FCIARB, Corbens, Swanage, 01929 422284, john@corbens.co.uk

Laurence APC Candidate, Rige, Berkshire, prm90201@myport.ac.uk

Lloyd Smale FRICS, Drew Pearce, Exeter, 01392 686347, lms@drewpearce.co.uk

Mark Annett FRICS, Mark Annett and Company, Chipping Campden, 01386 841622

Matthew Harvey MRICS, Tayler and Fletcher, Bourton on the Water, matthew.harvey@taylerandfletcher.co.uk

Matthew Waddams MRICS, Matthew Waddams, Minehead, 01643 709929, matthewwaddams@hotmail.com

Michael Dukes MRICS, Greenslade Taylor Hunt, Taunton, 01823 277121, michael.dukes@gth.net

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

Paul Cadge, Myddelton & Major, Salisbury, 01722 337575, paulcadge@myddeltonmajor.co.uk

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

Paul Oughton MARLA MNAEA, Moore Allen & Innocent, Cirecester & The Cotswolds, lettings@mooreallen.co.uk

Peter Davy MRICS, James and Sons, Poole, 01202 673131, peterdavy@jamesandsons.co.uk

Peter Olivey MRICS, Cole Rayment and White, Padstow, 01941533386, peter.olivey@crw.co.uk

Peter Sinclair MSc MRICS, Connells Survey and Valuation Ltd, Cheltenham/Gloucester/Cotswolds, peter.sinclair@connells.co.uk

Richard Keenlyside MRICS, Gilyard Scarth, Shaftesbury, 01747 851122, rsk@gilyardscarth.co.uk

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

Robert House FRICS, Kavanaghs, Trowbridge/Melksham, 01225 341504, roberthouse@kavanaghs.co.uk

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

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

Stephen Morris MRICS, Davies & Way, Bristol & Bath, 01225 400400, stephenmorris@daviesandway.com

T J Maggs MRICS, Maggs and Allen, Bristol, 01179734049, timm@maggsandallen.co.uk

## Wales

A W Graham FRICS, Graham & Co., Newport, 01633254825, surveys@homebuyers.wales

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

Anthony Filice FRICS, Kelvin Francis, Cardiff, 02920766538, tony@kelvinfrancis.com

Caroline Jones MRICS, Bruton Knowles, Cardiff, caroline.jones@brutonknowles.co.uk

Dafydd Hardy MRICS, Dafydd Hardy Y Gwerthwyr Tai, Bangor, 01248 371212

Darren Thomas MRICS, McCartneys, Brecon, darren@mccartneys.co.uk

David H Martin FRICS, Newland Rennie, Cwmbran / Newport, 01633 868341, cwmbbran@newlandrennie.com

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

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

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

Iwan Jones, Dafydd Hardy Estate Agents, Llangefni, 01248 723322, iwanjones@dafyddhardy.co.uk

J. Roger Davies MRICS, J.J. MORRIS, Cardigan, cardigan@jjmorriss.com

John Caines FRICS, Payton Jewell Caines, Bridgend, 01656 654328

John Jones MRICS, Countrywide Surveyors, Anglesey, john.jones@cwsurveyors.co.uk

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

Simon Edwards IRRV (Hons) MRICS, McCartneys LLP, Brecon, 01874 610990

## London

Alastair Iles MRICS, Iles Property, London, 02072354555, alastair@ilesproperty.co.uk

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

Alun Jones MRICS, Marler & Marler, Knightsbridge, 020 7235 9641

Andrew Fraser MRICS, Fraser and Fraser, London, andrew@simnat.co.uk

Angela Kelly MRICS, Hurford Salvi Carr, City of London, 02074901122, angela.kelly@h-s-c.co.uk

Anthony Lee MRICS, BNP Paribas Real Estate, London, 020 7338 4061, anthony.lee@bnpparibas.com

Benjamin JC Mire BSc (Est Man) FRICS, Trust Property Management, Colindale, London NW9, 02083586565, bmire@trustplc.com

Brendon Thomas MRICS, Oakland Surveyors, Tower Hamlets/Hackney/Newham/Southwark, 07837210662, b.thomas@oaklandsurveyors.co.uk

Chariton Symeou MRICS, Hanley Estates Ltd, Islington, 02072633388, harris@hanleyestates.com

Christopher Green FRICS, Curzon Land, London, 020 7720 6800, cgreen@curzonland.com

Christopher Ames MRICS, Ames Belgravia Ltd, Belgravia SW1, 020 7730 1155, ca@amesbelgravia.co.uk

D Major MRICS, David James Major Ltd, London, 07930 585543, davidjamesmajor@hotmail.co.uk

G Noe AssocRics, Parkgate Aspen, London, gavin@parkaspen.co.uk

Gemma Quinn BSc(Hons) BA(Hons) MRICS, Anderson Wilde and Harris, London, gemma.quinn@surveyors-valuers.com

Geoff McCabe, Daniel Watney, London, gmccabe@danielwatney.co.uk

Ian J Fergusson BSc FRICS, SBVS, London/UK, ian.fergusson@sbvals.co.uk

Ian Skinner FRICS, Bernard Skinner, Eltham, 020 8859 3033, ian@bernardskinner.co.uk

Ian Skinner FRICS, Bernard

# Surveyor contact details

Skinner, Eltham, 020 88593033,  
ian@bernardskinner.co.uk

J Homans MRICS, East London,  
homansjoshua@gmail.com

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

James Perris MRICS, De Villiers,  
Central London, 020 7887 6009,  
www.devilliers-surveyors.co.uk

Jeffrey Doble MRICS,  
Thamesview (Incl Dexters Estate  
Agents), Teddington, 020 8614  
1230

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

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

John King FRICS, Andrew Scott  
Robertson, Merton, 020 8971  
6780, jking@as-r.co.uk

John King FRICS, Andrew Scott  
Robertson, Wimbledon, 020  
8971 6780, jking@as-r.co.uk

Jonathan Price AssocRICS,  
Southside Property Management  
Services LTD, Bromley, 0330  
999 1612, jonathan@southside-  
property.co.uk

Keith Barnfield FRICS,  
Barnfields, Enfield, 020 8363  
3394

Lauren Elliott, Cluttons,  
Belgravia, lauren.elliott@  
cluttons.com

Lou Baxter AssocRICS, C&W,  
London, louisebarton@hotmail.  
com

Mark Wilson, MRICS, London,  
020 7935 9512, mark@globeapt.  
com

Michael Pollard FRICS, Pollards,  
Bexley, 01322 559990

Neil Moore MARLA, Cluttons,  
Blackheath, 020 7647 7820, neil.  
moore@cluttons.com

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

Paul L Whitley FNAEA MARLA,  
R Whitley & Co, West Drayton,  
01895 442711, estate@rwhitley.  
co.uk

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

Peter Yeates AssocRICS,  
Dorrington, London, peter.  
yeates@dorrington.co.uk

Robert Green MRICS, John  
D Wood & Co., Battersea /  
Belgravia / Chelsea / Fulham /  
Kensington / North West London  
/ South Kensington, 020 7352  
1484

Sally Higgs AssocRICS,  
DeVilliers, London,  
07508417163, sally.higgs@  
devilliers-surveyors.co.uk

Simon Aldous MRICS, Savills,  
London, 02070163861,  
saldous@savills.com

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

Tim Sworn MRICS, Sworn  
& Co, Chiswick, tim.sworn@  
swornandco.com

Will Barnes Yellowley  
AssoRICS, LHH Residential LLP,  
Kensington, 02073762286, will@  
lhhresidential.co.uk

## Scotland

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

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

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

Alexander Inglis MRICS, CKD  
Galbraith, Scottish Borders,  
01573 224 244, alex.inglis@  
ckdgalbraith.co.uk

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

Chris Hall MRICS, Rettie and  
Co, Edinburgh, 0131 220 4160,  
chris.hall@rettie.co.uk

Craig Henderson MRICS,  
Graham + Sibbald, Glasgow/  
West Scotland, 0141 332 1194,  
craig.henderson@g-s.co.uk

David Ward AssocRICS,  
Harvey Donaldson and Gibson,  
Glasgow, david.ward@hdg.co.uk

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

Gavin Miller MRICS, Graham +  
Sibbald, Stirling, 01786 463111,  
gavin.miller@g-s.co.uk

Gordon Macdonald FRICS,  
Allied Surveyors Scotland,  
Aberdeen/Aberdeenshire, 01224  
571163, gordon.macdonald@  
alliedsurveyorsscotland.com

Grant Robertson MRICS, Allied  
Surveyors, Glasgow, 0141 330  
9950

Greg Davidson MRICS, Graham  
+ Sibbald, Perth, 01738 445733,  
gdavidson@g-s.co.uk

Iain M Swaney FRICS, DM Hall,  
Dunfermline, iain.swaney@  
dmhall.co.uk

Ian Morton MRICS RICS  
Registered Valuer, Bradburne &  
Co, St Andrews, 01334 479479,  
ian@bradburne.co.uk

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

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

Kevin Hay BSc MRICS, Allied  
Surveyors, Ayr, 01292 265381

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

Marion Currie AssocRICS  
Registered Valuer, CKD  
Galbraith, Dumfries & Galloway,  
01556 505346, marion.currie@  
ckdgalbraith.co.uk

Mark Lewis FRICS, Symonds &  
Sampson, Sturminster Newton,  
mlewis@symondssandsampson.  
co.uk

Martin Douglas MRICS,  
Graham + Sibbald, Hamilton,  
01698422500, martin.  
douglass@g-s.co.uk

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

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

Pamela Morrison, Strutt &  
Parker LLP, Banchory, pamel.  
morrison@struttandparker.com

Paul Taylor MRICS, Shepherd  
Surveyors, Dundee, 01382  
200454, paul.taylor@shepherd.  
co.uk

Peter Rasberry MRICS, J &  
E Shepherd, Dunfermline,  
p.rasberry@shepherd.co.uk

Phiddy Robertson AssocRICS,  
CKD Galbraith, Inverness, 01463  
224343, phiddy.robertson@  
ckdgalbraith.co.uk

Richard R Blanski FRICS, J&E  
Shepherd Chartered Surveyors,  
Kirkcaldy, 01592 205442,  
kirkcaldy@shepherd.co.uk

Robbie Buchanan MRICS,  
Graham + Sibbald, Kirkcaldy,  
01592266211, rbuchanan@g-s.  
co.uk

Ronald G Smith MRICS, J & E  
Shepherd, East Dunbartonshire/  
North Lanarkshire, 01236  
780000, ronnie.smith@  
shepherd.co.uk

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

## Northern Ireland

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

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



## Surveyor contact details

Andrew Smyth, MacFarlane & Smyth, Belfast, 028 90325888, [andrew.smyth@macfarlanesmyth.com](mailto:andrew.smyth@macfarlanesmyth.com)

Eoin Lawless FRICS, Eoin Lawless Estate Agents, Warrenpoint, [info@lawlessestateagent.co.uk](mailto:info@lawlessestateagent.co.uk)

Gareth Gibson FRICS, Douglas Huston, Belfast, 02890683711, [gareth@hustonestateagents.com](mailto:gareth@hustonestateagents.com)

H Rountree AssocRICS, MacFarlane & Smyth, Belfast, [heather.rountree@macfarlanesmyth.com](mailto:heather.rountree@macfarlanesmyth.com)

Joanne Glover MRICS, Alexander Reid & Frazer, County Down, 02844619966, [joanne@alexanderreidfrazer.com](mailto:joanne@alexanderreidfrazer.com)

Joseph McGeehan MRICS, McGeehan Chartered Surveyors, Belfast, [joseph@mcgeehan.co.uk](mailto:joseph@mcgeehan.co.uk)

Kirby O'Connor AssocRICS, GOC Estate Agents Ltd, Belfast, 02890662366, [kirby@gocestateagents.com](mailto:kirby@gocestateagents.com)

Martin Mallon MRICS, Lambert Smith Hampton, Belfast, [mmallon@lsh.ie](mailto:mmallon@lsh.ie)

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

Paul Birt MRICS, Paul Birt Estate Agents, Magherafelt, [mail@paulbirt.co.uk](mailto:mail@paulbirt.co.uk)

Samuel Dickey MRICS, Simon Brien Residential, Belfast, 02890428989, [sdickey@simonbrien.com](mailto:sdickey@simonbrien.com)

Stephen Fitzpatrick MRICS, Stephen Fitzpatrick Estd.1881, Newry Co.Down, 02830265533, [info@stephenfitzpatrick.co.uk](mailto:info@stephenfitzpatrick.co.uk)

Stephen Henry AssocRICS, Tom Henry & Co, Belfast, 02887726992, [stephen@tomhenryandco.com](mailto:stephen@tomhenryandco.com)

Terry Finlay MRICS, Montgomery Finlay & Co., Enniskillen, 02866324485, [montgomeryfinlayandco@hotmail.com](mailto:montgomeryfinlayandco@hotmail.com)

Thomas G Henry MRICS, Tom Henry & Co, Belfast, 02887726992, [tom@tomhenryandco.com](mailto:tom@tomhenryandco.com)

William Butcher MRICS, L Butcher. Chartered Surveyor - Estate Agent, Coleraine, 07423 457240, [liamgbutcher@btinternet.com](mailto:liamgbutcher@btinternet.com)

# Contacts

## Economics Team

### Janet Guilfoyle

Market Surveys Administrator

+44(0)20 7334 3890

jguilfoyle@rics.org

### Simon Rubinsohn

Chief Economist

+44(0)20 7334 3774

srubinsohn@rics.org

### Jeffrey Matsu

Senior Economist

+44(0)20 7695 1644

jmatsu@rics.org

### Michael Hanley

Economist

+44(0)20 7695 1684

mhanley@rics.org

### Tarrant Parsons

Economist

+44(0)20 7695 1585

tparsons@rics.org

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### United Kingdom RICS HQ

Parliament Square, London  
SW1P 3AD United Kingdom

**t** +44 (0)24 7686 8555

**f** +44 (0)20 7334 3811

[contactrics@rics.org](mailto:contactrics@rics.org)

#### Media enquiries

[pressoffice@rics.org](mailto:pressoffice@rics.org)

### Ireland

38 Merrion Square, Dublin 2,  
Ireland

**t** +353 1 644 5500

**f** +353 1 661 1797

[ricsireland@rics.org](mailto:ricsireland@rics.org)

### Europe

[excluding UK and Ireland]

Rue Ducale 67,  
1000 Brussels,  
Belgium

**t** +32 2 733 10 19

**f** +32 2 742 97 48

[ricseurope@rics.org](mailto:ricseurope@rics.org)

### Middle East

Office G14, Block 3,  
Knowledge Village,  
Dubai, United Arab Emirates

**t** +971 4 446 2808

**f** +971 4 427 2498

[ricsmenea@rics.org](mailto:ricsmenea@rics.org)

### Africa

PO Box 3400,  
Witkoppen 2068,  
South Africa

**t** +27 11 467 2857

**f** +27 86 514 0655

[ricsafrica@rics.org](mailto:ricsafrica@rics.org)

### Americas

One Grand Central Place,  
60 East 42nd Street, Suite 2810,  
New York 10165 – 2811, USA

**t** +1 212 847 7400

**f** +1 212 847 7401

[ricsamericas@rics.org](mailto:ricsamericas@rics.org)

### South America

Rua Maranhão, 584 – cj 104,  
São Paulo – SP, Brasil

**t** +55 11 2925 0068

[ricsbrasil@rics.org](mailto:ricsbrasil@rics.org)

### Oceania

Suite 1, Level 9,  
1 Castlereagh Street,  
Sydney NSW 2000, Australia

**t** +61 2 9216 2333

**f** +61 2 9232 5591

[info@rics.org](mailto:info@rics.org)

### North Asia

3707 Hopewell Centre,  
183 Queen's Road East  
Wanchai, Hong Kong

**t** +852 2537 7117

**f** +852 2537 2756

[ricsasia@rics.org](mailto:ricsasia@rics.org)

### ASEAN

10 Anson Road,  
#06-22 International Plaza,  
Singapore 079903

**t** +65 6635 4242

**f** +65 6635 4244

[ricssingapore@rics.org](mailto:ricssingapore@rics.org)

### Japan

Level 14 Hibiya Central Building,  
1-2-9 Nishi Shimbashi Minato-Ku,  
Tokyo 105-0003, Japan

**t** +81 3 5532 8813

**f** +81 3 5532 8814

[ricsjapan@rics.org](mailto:ricsjapan@rics.org)

### South Asia

48 & 49 Centrum Plaza,  
Sector Road, Sector 53,  
Gurgaon – 122002, India

**t** +91 124 459 5400

**f** +91 124 459 5402

[ricsindia@rics.org](mailto:ricsindia@rics.org)