

RICS Housing Market Survey UK

Economic uncertainty weighs on transactions

- **House prices continue to fall**
- **Price expectations negative but sales expectations positive**
- **London continues to buck national price trend**

The June 2011 RICS Housing Market Survey highlights three key points. First, house prices – on balance – continue to fall. Secondly, activity levels remain flat and are at relatively depressed levels. Finally, there continues to be a stark regional divergence with London continuing to buck the national price trend.

The headline price balance remained broadly unchanged at -27 i.e. 27% more surveyors reported falls rather than rises. However, of those actually reporting falls, 78% did so within the 0 to 2% range.

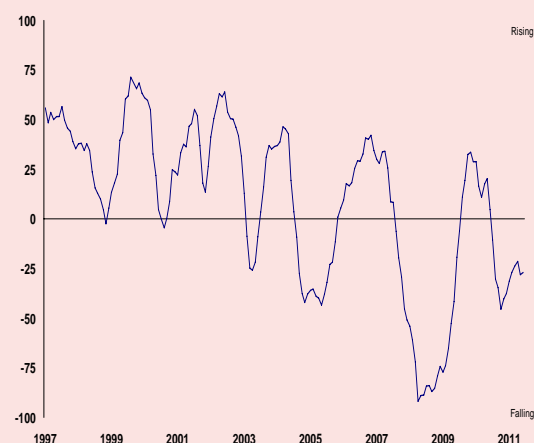
New buyer enquiries were unchanged (this has been the broad trend all year). Meanwhile, new vendor instructions were also pretty flat after rising more convincingly in the previous two months. Anecdotal evidence from surveyors suggests that the uncertain economic climate is making transactions more difficult and longer to conclude.

On the activity front, newly agreed sales (over the month) edged up very modestly, whilst average completed sales (over the last three months) increased by 0.8% to 14.8 per surveyor (branch). However, sales remain well below their long run average of 26.4 (since 1994). The rise in sales contrasts with the 3.1% fall in average stocks levels to 69.5 properties per surveyor (branch). As a result, the sales to stock ratio – an indicator of market slack – increased to 21.3%; a moderate improvement on last month but much weaker than the long run average of 33.5%.

Regionally, London continues to be the only part of the country where surveyors, on balance are reporting, rising house prices. Indeed, excluding London, the headline price balance was much weaker at -35. Outside of England & Wales, surveyors in Scotland and Northern Ireland reported falling prices, though much severer in the latter region.

Finally, in terms of the forward looking components of the survey, sales expectations actually turned increasingly positive, but price expectations remained deeply negative.

Prices - England and Wales - change over past 3 months
Net balance, % (SA)



Prices - regional breakdown - change over past 3 months
Net balance, % (SA)



	Proportion of surveyors reporting a rise, fall or no change in house prices over the last three months				Prices	Stocks of	Completed
	Rise %	Same %	Fall %	Balance**	Balance**	homes on books	sales*
	-----Not Seasonally Adjusted-----				-----Seasonally Adjusted-----		
Apr-11	12	59	29	-16	-21	67	15
May-11	10	57	33	-23	-28	72	15
Jun-11	10	58	32	-22	-27	69	15

* House sales over the past three months

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

Figures may not sum up to 100% due to rounding errors. All figures in table refer to England and Wales only.

Total number of survey contributors = **272 (Covering 405 offices)**



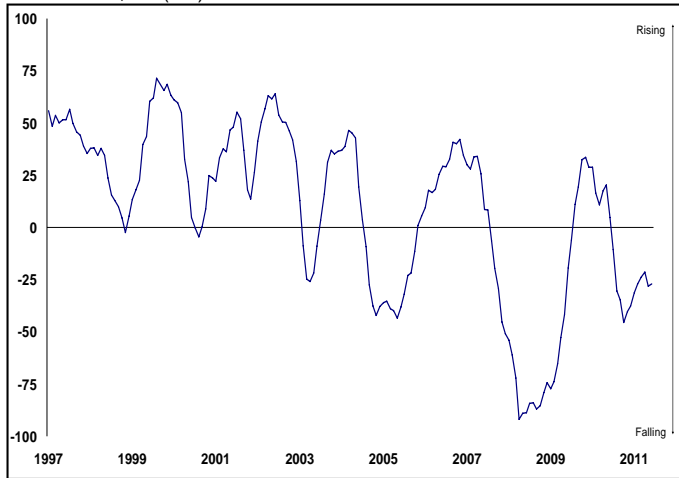
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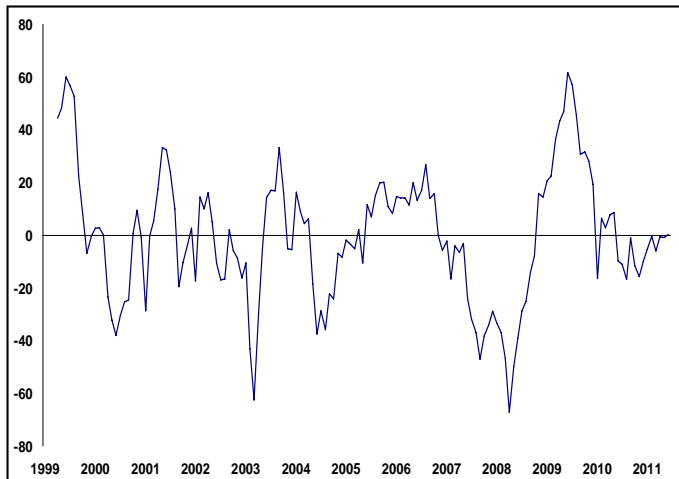
National information

Prices - England and Wales - change over past 3 months
Net balance, % (SA)



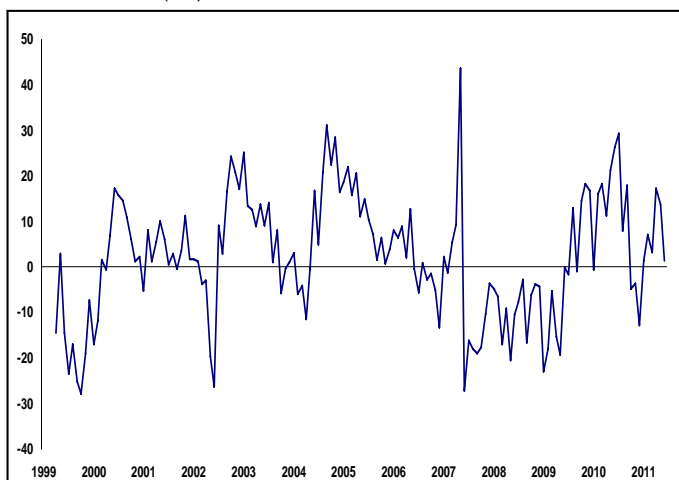
The headline net price balance remained broadly unchanged in June, moving from -28 to -27.

New buyer enquiries- England and Wales - change over past month
Net balance, % (SA)



The new buyer enquiries net balance remained flat in June for the third consecutive month, moving from -1 to 0.

New vendor instructions - England and Wales - change over past month
Net balance, % (SA)

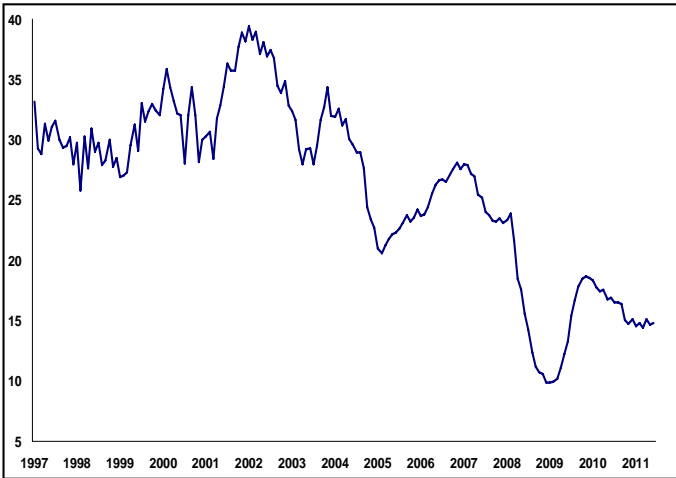


New vendor instructions declined sharply this month, with the net balance falling from +14 to +1.

National information

Property sales in England & Wales, during last three months

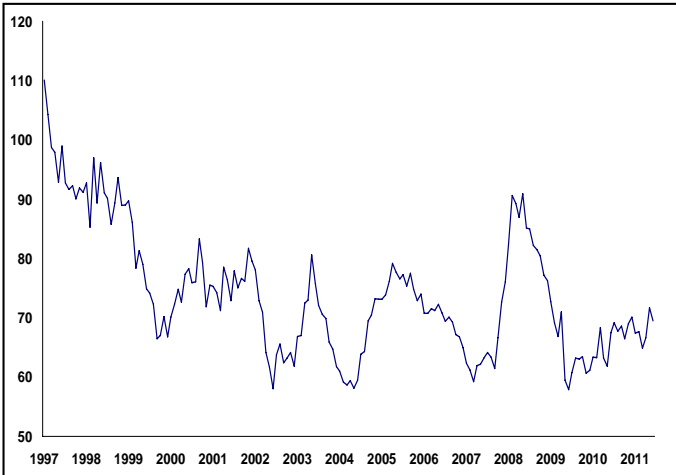
Number, average per surveyor (branch)



Average sales per surveyor edged up in June, from 14.7 to 14.8.

Unsold stocks of properties on surveyors' books, Eng & Wales

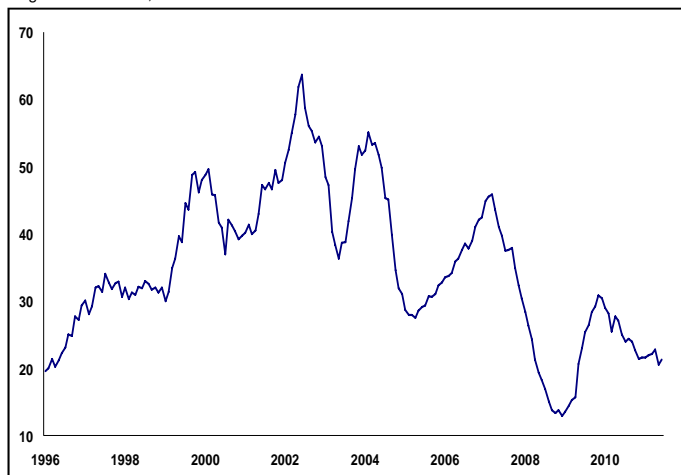
Number, average per surveyor (branch), end period



The average amount of stock on surveyors' books declined from 71.7 to 69.5.

Ratio of sales to unsold stocks on surveyors' books

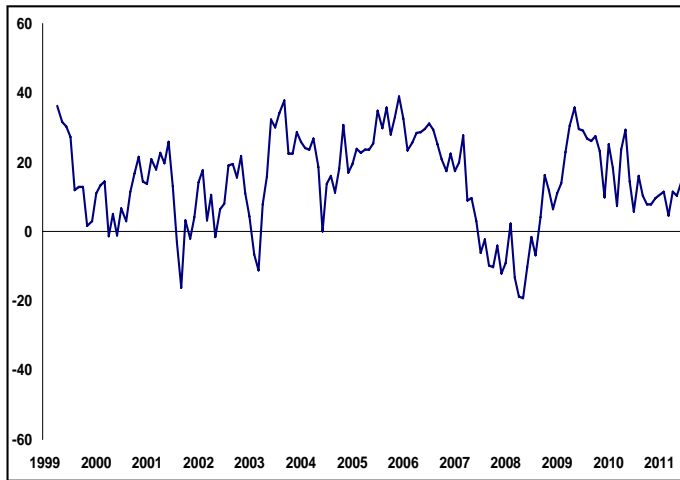
England and Wales, %



The sales to stock ratio edged up this month, moving from 20.5% to 21.3%.

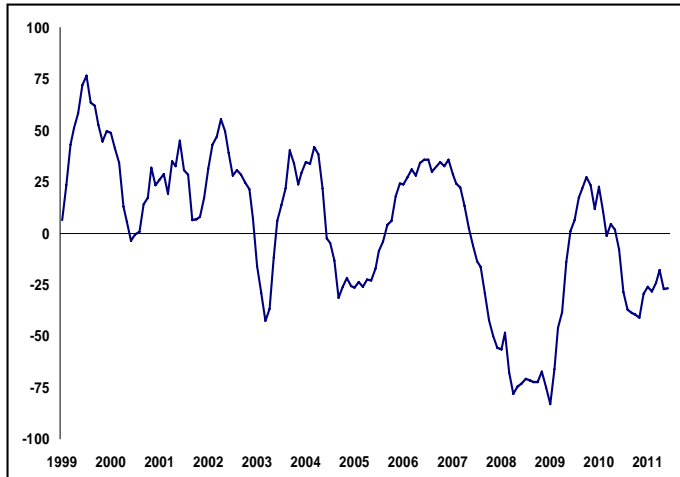
National information

Sales expectations - England and Wales - change over next 3 months
Net balance, % (SA)



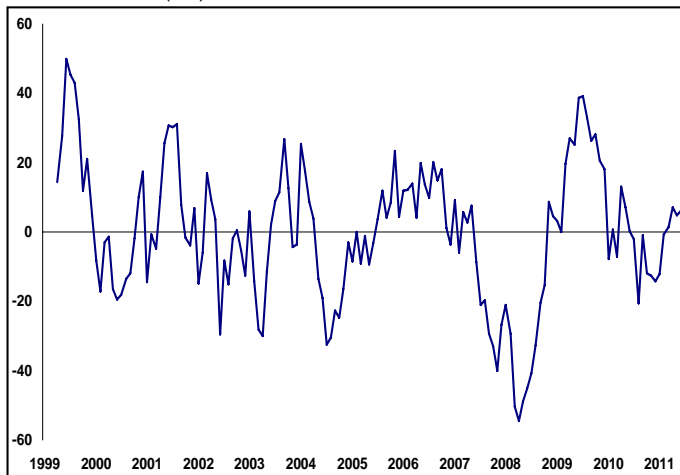
Sales expectations increased in June, with the net balance rising from +10 to +14.

Price expectations - England and Wales - change over next 3 months
Net balance, % (SA)



Price expectations remained unchanged this month, with the net balance at -27.

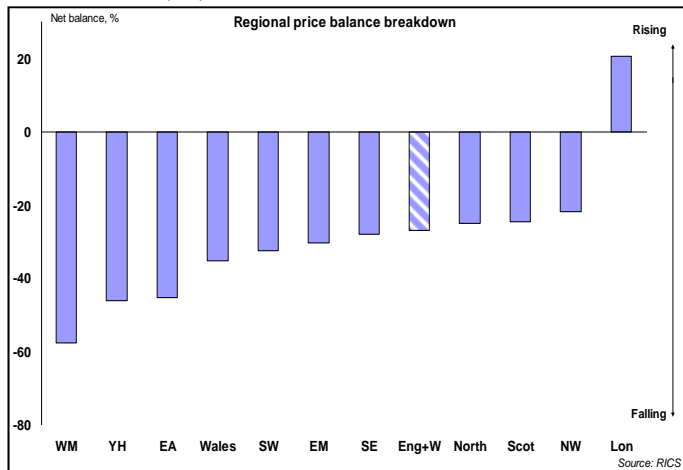
Newly agreed sales - England and Wales - change over past month
Net balance, % (SA)



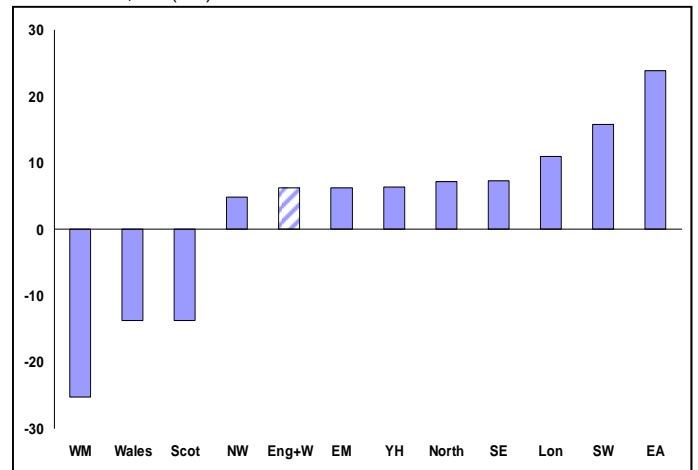
Newly agreed sales edged up on the month, with the net balance rising from +13 to +14.

Regional comparisons for the current month

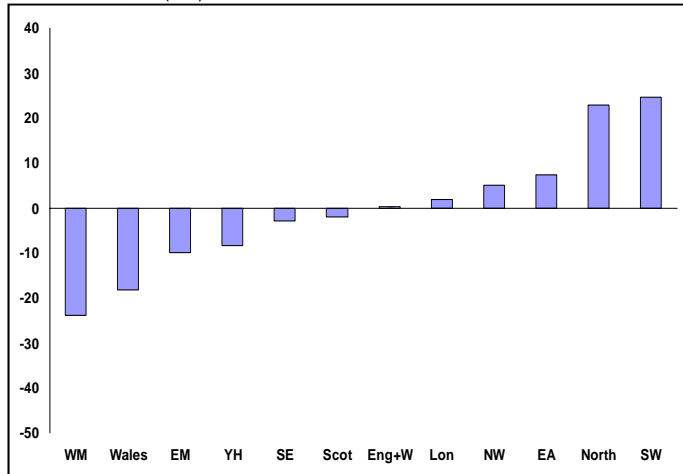
Prices - England and Wales - change over past 3 months
Net balance, % (SA)



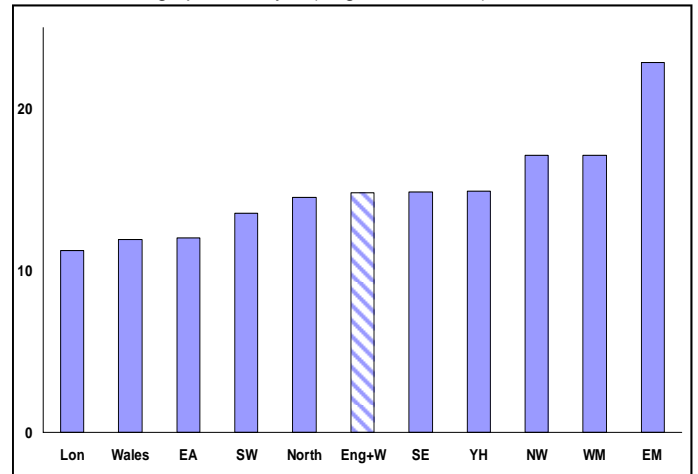
Newly agreed sales - England and Wales - change over past month
Net balance, % (SA)



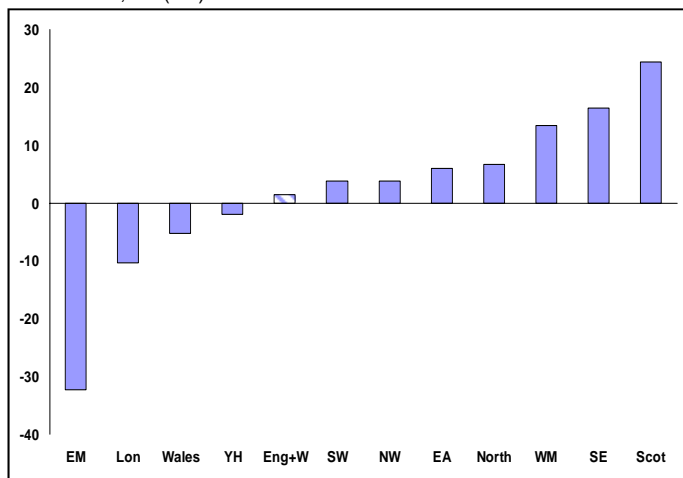
New buyer enquiries- England and Wales - change over past month
Net balance, % (SA)



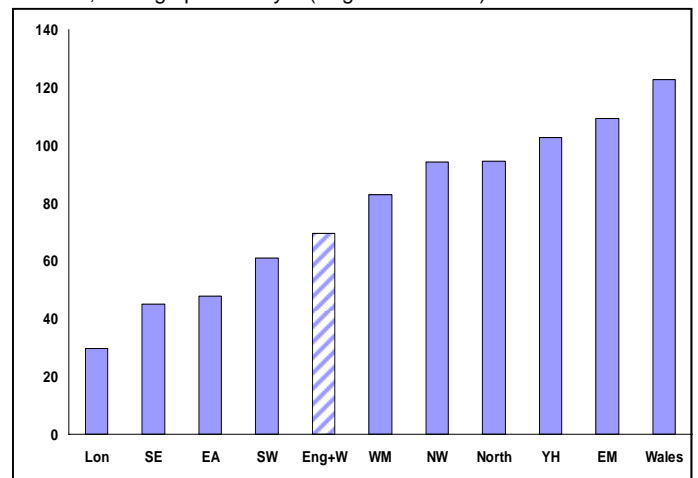
Completed sales per surveyor, over past 3 months
Number, average per surveyor (England & Wales)



New vendor instructions - England and Wales - change over past month
Net balance, % (SA)



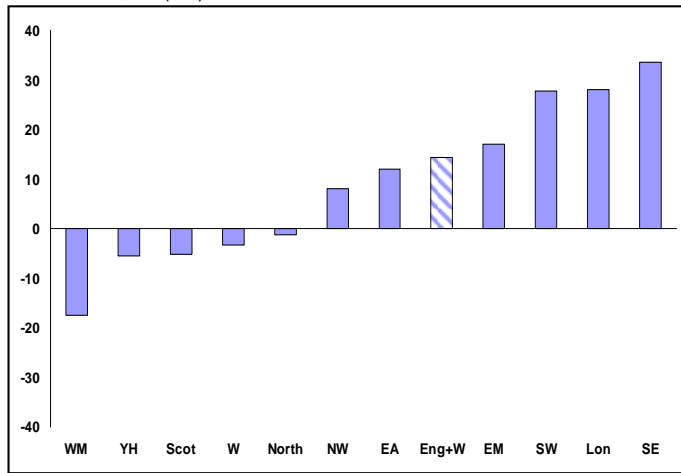
Current inventory of stock on surveyors books
Number, average per surveyor (England & Wales)



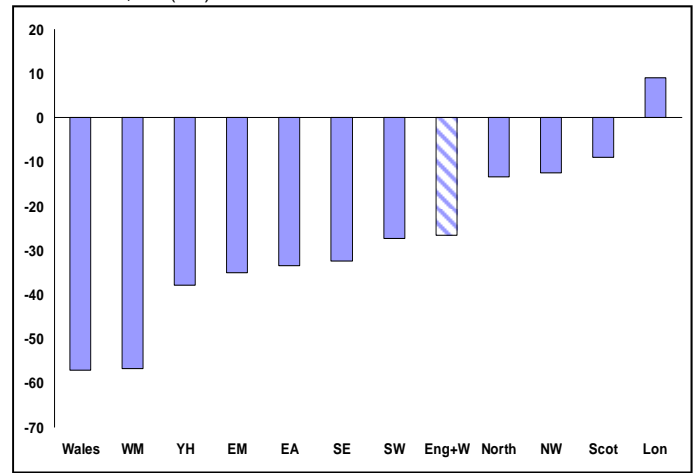
Key: N = North, YH = Yorkshire & Humberside, NW = North West, EM = East Midlands, WM = West Midlands, EA = East Anglia, SE = South East, SW = South West, W = Wales, L = London, Scot = Scotland

Regional comparisons for the current month

Sales expectations - England and Wales - change over next 3 months
Net balance, % (SA)



Price expectations - England and Wales - change over next 3 months
Net balance, % (SA)



Key: N = North, YH = Yorkshire & Humberside, NW = North West, EM = East Midlands, WM = West Midlands, EA = East Anglia, SE = South East, SW = South West, W = Wales, L = London, Scot = Scotland

Regional Price Summary, United Kingdom

Proportion of surveyors reporting changes in price over last three months*

Price change (%) by band	Price rise -----					Price fall -----					Balance**
	> +8,	+5 to 8,	+2 to 5,	0 to +2,	Same,	0 to -2,	-2 to -5,	-5 to -8,	< -8		
North	0	0	0	5	74	18	2	0	0	-15	
Yorkshire & Humberside	0	0	0	3	51	30	7	7	1	-42	
North West	0	0	3	3	75	20	0	0	0	-15	
East Midlands	0	5	1	3	60	21	6	3	0	-21	
West Midlands	0	0	0	5	31	45	15	4	0	-58	
East Anglia	0	0	0	3	51	44	1	0	0	-42	
South East	0	2	0	8	59	25	5	1	0	-22	
South West	0	0	0	2	65	25	6	1	0	-29	
Wales	0	0	4	5	54	26	8	2	0	-29	
London	0	2	8	23	62	5	0	0	0	27	
Scotland	0	0	0	4	71	19	2	3	1	-22	
Northern Ireland	0	0	0	0	54	21	11	10	4	-46	

* Not Seasonally Adjusted

** Balance = the percentage of surveyors reporting a rise, minus those reporting a fall. Numbers may not add up due to rounding

Chartered surveyor market comments

North

Edmund Alder MRICS, Gleeson Developments Ltd, Newcastle upon Tyne, Tyne & Wear, 0191 5370070 - Uncertainty of economic recovery, and job security within public sector (large proportion in NE).

Neil Foster BSc HONS MRICS, Foster Maddison Property Consultants, Newcastle upon Tyne, Tyne & Wear, 01434 607711 - Investment transactions are supporting the market but there is a frightening 'bubble' of property being held back by reluctant vendors. Forecast for this to end in tears for homeowners unless a more pragmatic approach to selling is adopted soon.

Paul McSkimmings BSc MRICS, Edward Watson Associates, Newcastle upon Tyne, Tyne and Wear, 0191 281 2444 - Limited mortgage availability continues to stifle market activity. Future growth will be further hindered as first time buyers struggle to save deposits of up to 20%. Those higher up the ladder with high levels of equity in the properties are still moving provided that their asking price is sensible.

Peter M Hayward RICS, Hayward Tod Associates Ltd, Carlisle, Cumbria, 01228 810300 - Plenty coming to the market still. Some vendors remain head in the sand regarding downward pressure on values. Only those who have sold can be regarded as 'buyers'; with the remainder merely window shopping, despite the desire to move. The coming months will prove difficult with more people having to accept that a move might not be possible for them, whilst others may find that selling at a lower level is the only option for them in terms of financial pressures.

Richard Sayer BSc FRICS, Rook Matthews Sayer, Alnwick/ Bedlington, Northumberland, 01665 510044 - The market remains stable but activity is still below normal levels with reduced viewings and continuing fragile public confidence. Mortgages remain a problem for home buyers and positive economic indicators are not being reported by the media who continue to publicise only negative factors. Predicted increased unemployment in the North East has not happened with employment actually increasing. Reasonably priced new instructions continue to sell well at all levels of the market.

Stuart T Allan FRICS, Broadley & Coulson, Bishop Auckland, County Durham, 01388 602656 - There continues to be difficulties at the lower end of the market as a result of the problems first time buyers have in obtaining mortgages. This reflects through the remainder of the market. We are increasingly seeing parents re-mortgaging their houses in order to provide deposits for their offspring.

Yorkshire & Humberside

Alex McNeil MRICS, Bramleys, Calderdale, Halifax, 01484 530361 - I am considering subletting part of the show room as a Buddhist temple as it is so quiet, there is currently no light at the end of the tunnel with there being a low level of transactions.

Alex McNeil MRICS, Bramleys, Huddersfield, West Yorkshire, 01484 530361 - Lots of viewings, a few offers, hardly any sales.

Ben Hudson MRICS, Hudson Moody, York, North Yorkshire, 01904 650650 - A rollercoaster market week by week as confidence ebbs and flows.

Chris Clubley FRICS CAAV, Chris Clubley & Co., Market Weighton, York, 01430 874000 - Uncertainty in the employment market linked with higher costs of living, fuel etc. is keeping confidence low.

Edward Waterson FRICS, Carter Jonas, York, North Yorkshire, 01904 558201 - Stock levels are at high levels and buyer confidence is fragile, resulting in a number of stalled transactions. Long term we see stabilization in the market but for the time being there remains downward pressure on prices.

Francis Brown FRICS, Norman F Brown, Richmond, North Yorkshire, 01748 822473 - The market is in a depressed state with prices falling again having stabilised last year.

Ian Adams MRICS MEW/ RICS Registered Valuer, Miller Metcalfe Ltd (consultant), Kingston upon Hull, East Riding of Yorkshire, 7703329933 - In the last few months have noticed a mood change in both the Estate Agents that I speak with, and buyers who are anxious not to pay over the odds, but at the same time not lose the property. There are micro markets within markets where the direction of demand and values can contradict the general overview of the market itself. For instance dying city centres are having a negative effect on the recent apartment building boom, whilst suburban traditional homes are coming on the market and attracting wider interest.

Ian Bebbington BSc MRICS, Ian Bebbington Ltd, Northallerton, North Yorkshire, 01609 760333 - Sellers clearly wish to sell but buyer confidence is still low. This could be a general reflection of the austerity measures and that peoples jobs are at risk. It could also be the continuing worries about the economy and the poor state of the housing market following the credit crunch.

John E Haigh BSc MRICS FAAV, Lister Haigh, Knaresborough, North Yorkshire, 01423 860 322 - The combination of the country's economic state, demands on household income and high deposits required have resulted in general lack of confidence.

John Francis FRICS, Crapper & Haigh, Sheffield, South Yorkshire, 0114 272 9944 - Realistically priced properties continue to sell but only slowly.

Ken Bird MRICS, Renton & Parr, Wetherby, West Yorkshire, 01937 582731 - Had two solid months on the bounce with sales at highest level for 20 months, and even getting full asking prices and best offers again suggesting an improving market in the best locations.

Mark John Hunter MRICS, Grice and Hunter, Doncaster, South Yorkshire, 013020360141- In terms of sales, number of surveys and general enquiries, June has seen a considerable improvement on low levels of activity in April/May (trading was very badly adversely damaged by the Bank Holidays and this period is now becoming like Christmas, namely no meaningful activity takes place for weeks on end).

Richard J Graves FRICS, D. Dunk, Lewis & Graves, Bridlington, East Yorkshire, 01262 672576 - I have seen the ups & downs of the property market over the past 40 years but this is the longest and deepest I have experienced and I still cannot see any improvement for the next couple of years.

North West

Andrew Duncan, J.B. & B. Leach, St Helens, Merseyside, 01744 22816 - It has become a difficult market to predict. There is no pattern at the moment. We are just hoping the levels of activity increase before we enter the school summer holidays when it will go quiet again.

Andrew Holmes BSc (Hons) Dip Surv MRICS, Carter Jonas, South Lakeland, Cumbria, 01539 814908 - A steady month with good activity from buyers who are taking a more positive view. There is a lot of choice in the market and we are seeing buyers view many properties before making any decisions. As ever, presentation, quality, location and price are the key features with buyers quickly dismissing properties which do not meet their expectations.

Brain Jackson FRICS, Ellis & Sons, Southport, Merseyside, 01704 534171 - Market in Southport still remains stagnant. With the next two months being a lousy holiday period and the media reports of more redundancies in the future, we don't expect it to improve in the immediate future.

John Halman FRICS, Gascoigne Halman, Wilmslow, Cheshire, 01625 460345 - Slightly better sales for June but still low levels of activity generally and lacklustre sentiment.

John Williams FRICS, Brennan Ayre O'Neill, Wirral, Merseyside, 1513439060 - Another month of steady volumes with no apparent significant movement in prices (up or down). Steady might be the most realistic outlook for the market given the consumers currently cautious approach to the economy and spending.

Michael Fisher FRICS, Fisher & Wrathall, Lancaster, Lancashire, 01524 68822 - Vendors expectations are still very high and buyers are still not prepared to move forward with high offers.

Peter E Humphreys MRICS, Humphreys of Chester & Wrexham, Chester, Cheshire, 01244 401100 - Low interest rates keeping market steady.

Shannon Conway MRICS, Jones Lang LaSalle, Liverpool, Merseyside, 0151 242 6604 - The past few months has seen an increase in the number of fall throughs due to down valuation.

East Midlands

Christopher Shallice FRICS FAAV, Hix & Son, Holbeach, Lincolnshire, 01406 422 777 - Generally market price expectations are too high and an adjustment across the board is due before matters can go forward.

David Hawke FRICS, David Hawke & Co., Worksop, Nottinghamshire, 01909 531450 - A little lift in instruction and sales this month.



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David Johnson Dip Arb FRICS MCIrb, Readings Property Group Ltd., Leicester, Leicestershire, 0116 204 6157 - Continuing uncertainty on economic and jobs front are still hampering market progress. Auction sales proving successful with investors still willing to move into the right opportunities.

Edward Wreglesworth FRICS, Escritt Barrell Golding, Sleaford, Lincolnshire, 01529 302271 - There has been a recent surge in sales agreed with a reasonably good pipeline of transactions, but many concerns including defence cutbacks in Lincolnshire persist. This, and similar factors, have apparently caused a further decline in the volume of enquiries.

James Abbott MRICS, Strutt & Parker, Market Harborough, Leicestershire, 01858 433 123 - Confidence is fickle, and the key. Where one person offers on a property, we often find someone else then wishes to compete, which helps progress contracts to exchange quickly, but there are equally plenty of good properties being viewed by people who thereafter sit on the fence. The tone of the national news at present (industrial action, retail high street closures, and Greek austerity riots) does not help.

Mark Newton FRICS, Newton Fallowell, Grantham, Lincolnshire, 01476 591900 - Vendors expectations are being increased by over zealous agents in search of instructions. Sales are only happening at competitive prices.

Martin Pendered FRICS, Martin Pendered & Co., Wellingborough, Northamptonshire, 01933 228822 - June has been the most active month for over a year with motivated buyers offering much closer to the asking prices and in some cases exceeding them. Confidence has returned and this is reflected in the volume of sales throughout the area, although the more expensive houses are a slower market.

Neil Hunt FRICS, Wilkins Vardy Residential Limited, Chesterfield, Derbyshire, 01245 270123 - The market has been remarkably stable with average sale prices still at 95% of the asking figure. The portents are that this situation will continue for the remainder of the summer.

Peter Mountain FRICS, Peter Mountain, Louth, Lincolnshire, 01507 603 366 - No change. Still extremely difficult selling conditions.

R L Bell BSc FRICS, Robert Bell and Company, Horncastle, Lincs, 01507 522222 - A shortage of fresh properties is pushing prices upwards in the short-term. However, there is a lot of 'mouldy' stock at too high prices and buyer confidence is not there.

Steve Gadsby BSc FRICS, Gadsby Orridge, Derby, Derbyshire, 01332 296396 - The ongoing issues of lack of mortgage funding and lack of confidence in house purchase is still holding the market back from any improvement.

West Midlands

A Champion FRICS, Halls, Worcester, Worcestershire, 01905 611066 - Market has become harder over the last 4 - 6 weeks. Viewing rates are strong but is not leading to offers. Confidence is still a problem.

Andrew Grant FRICS, Andrew GrantLLP, Worcester, Worcestershire, 7976982742 - The last quarter's activity has closely mirrored last year's picture and the year-to-date results are very similar. Financial constraints are becoming increasingly evident amongst both buyers and sellers and deals are thereby taking greater time to conclude.

Andrew Oulsnam MRICS, Robert Oulsnam & Co., Barnet Green, Birmingham, 0121 445 3311 - There has been a little improvement in the market but realistic pricing is the key to selling with prices still falling.

Andrew R Perrin MRICS, Fraser Wood (Midlands) Limited, Walsall, West Midlands, 01922 627686 - There appear to be very few first time buyers in the market and in particular in Walsall the lower end of the market has been particularly hard hit in recent months. That said, it appears that at the middle to top end of the market there are a number of buyers and we have had properties where multiple offers have been received.

Andrew Spittle MRICS, Ruxton Surveyors, Solihull, West Midlands, 0121 704 0100 - Buying activity increased in May following a quieter than usual April, June has however seen some decline in this activity. Contrary to regional and national trends, price locally have shown some modest improvement this year as a whole but now appear to have stabilised. The continued uncertainty in the national economic outlook seems to be placing some downward pressure on the market.

Edward Gallimore FRICS, Edward Gallimore, Tenbury Wells, Worcestershire, 01584 810436 - A strong demand for properties but the price must be right.

Jeremy Dell MRICS FAAV, J J Dell & Company, Oswestry, Shropshire, 01691 653437 - Sales have picked up but the overall demand is flat and will remain so for some considerable time.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, Worcestershire, 01562 821600 - More property has come for sale in recent months but levels of enquiry have reduced. General economic situation affecting both buyers and sellers.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, Worcestershire, 01562 821600 - Volume of property for sale in the area has increased dramatically over the last month resulting in a greater choice for prospective buyers. Prospective purchasers submitting low offers. Signs that price levels may reduce further later this year.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, Worcestershire, 01562 821600 - Government cutbacks and general job uncertainty affecting property sales. Many properties from early spring still available. Prospective buyers are looking but not committing. Generally a weak sales market.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, Worcestershire, 01562 821600 - More property has come for sale in recent months but levels of enquiry have reduced. General economic situation affecting both buyers and sellers.

John Ozwell FRICS, Hunters, Solihull, West Midlands, 01564 771000 - More affordable mortgage products creeping into the market is helpful. Reasonable stocks and general interest but low confidence affecting the level of offers coming in.

Julian T J Owens, Arkwright Owens, Hereford, Herefordshire, 01432 267213 - Positive - low interest rates. Negative - concern about job security.

Ryan Williams BSc FRICS, McCartneys LLP, Hay-on-Wye, Hereford, 01497 820778 - Some movement but very few proceedable buyers when compared to the large number of properties available. Still too many uncommitted vendors. First time buyers struggling.

Sue Brotheridge (Residential Sales), Connells Estate Agents, Kidderminster, Worcestershire, 01562 68214 - Owners are more receptive to offers at the moment. An increase in general activity in the area.

East Anglia

Charlie Penrose MRICS, Arnolds Property Consultants LLP, Norwich, Norfolk, 01603 620551 - May and early June has seen an increase in activity from buyers, and more stock coming to market. The resulting activity is heartening, but 'one swallow does not a summer make'. It is still difficult to predict if this is trend.

Christopher Philpot BSc FRICS, Lacy Scott & Knight, Stowmarket, Suffolk, 01449 612384 - A strong market, but very price sensitive. Good demand in the £500,000+ price range.

David Knights MRICS, David Brown, Ipswich, Suffolk, 01473 222266 - The most positive month of the year with good level of sales and increased numbers of buyers. An encouraging month for new instructions as well although prices remained static.

Derek Coates MRICS, Venmores, Liverpool, Merseyside, 0151 236 0301 - The market remains flat due to peoples' fear regarding employment prospects, particularly in the public sector. The perceived lack of finance is also having a negative effect. The suburbs are faring better than the city centre where the latest reports show that in the last 3 months only 41 flats have been sold in the city centre.

Jeffrey Hazel FRICS, Geoffrey Collins & Co., Kings Lynn, Norfolk, 01553 774135 - There is more activity in the market now but confidence is lacking. Many vendors are still unable to accept that values have fallen and too many agents are still giving inflated market appraisals.

John Pocock, Pocock & Shaw, Cambridge, Cambridgeshire, 01223 322552 - Uncertainty and lack of confidence are leading to great caution particularly on the part of first time buyers, with a widening gap between sellers expectations and prices buyers are willing to pay. Activity in much of the market is slowing down but there is still serious competition for a certain limited number of houses.

Larry Russen BSc FRICS, Russen and Turner, Kings Lynn, Norfolk, 01553 768361 - Buyers now view significantly more properties before making an offer.

Strutt and Parker, Ipswich, Suffolk, 01472 220444 - We are finding that there is activity under £500,000 having agreed four sales in the last 2 weeks all under this level. The rest of the market is hard work especially over £1,000,000. Still lack of buyer confidence.

Richard Bannister FRICS, Bannister & Company, Felixstowe, Suffolk, 01394 282828 - Interesting that no real increase in applicant enquiries but those that are active are getting more confident and proceeding with offers/purchasing of properties especially with more to choose from. Market is helped by the fact that they in turn are more active having received offers on their own properties. There is however still a dearth of first time buyers.



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South East

Andrew Miller FRICS, Linay & Shipp, Orpington, Kent, 01689 825678 - Offers do seem to be coming in quite 'low'. We believe the reports in the press of 'possible price drops' in housing market by the end of the year doesn't help. 'Wimbledon fortnight' has had an impact on volume of new enquiries.

Anthony Jamieson MRICS, Carke Gammon Wellers, Guildford, Surrey, 01483 880900 - Tough market conditions. Shortage of stock. Problems with funding. Still uncertainty in the market. However, the right property at the right price will still create competition and will sell. Very hand to mouth.

Antony Bromley-Martin MRICS, Strutt & Parker, Chelmsford, Essex, 01245 254600 - Our most active level of the market is between £500,000 and £1,000,000. Above £1m it remains subdued with little activity. We are fast approaching the holiday season where, traditionally, the housing market slows down. I suspect we are all hoping for an improvement in fortunes in the autumn.

Bryan Elphick FRICS, Elphick Estate Agents, Ashtead, Surrey, 01372 272321 - Some improvement in activity at £300K - £500K range, otherwise very low volume activity.

Clive Rutland FRICS, Rutland Chartered Surveyors, Southampton, Hampshire, 023 8066 3451 - The market is still subdued and the number of mortgages seems to have reduced rather than increased. There are signs that the investors are back in the market reflecting lower purchase prices and higher rents. It is likely that the mortgage market will ease over the next 6 months and this should reverse or limit the current reductions in value. Any increase in mortgage interest rates is likely to affect investors who purchased in 2006/2007 and we anticipate an increasing number of distressed sales in that period. That is seen as the light at the end of the tunnel and we see the market moving forward in terms of numbers of sales towards the end of the year.

David Nesbit FRICS, D.M.Nesbit & Company, Portsmouth, Hampshire, 023 9286 4321 - Another difficult month. Purchasers are highly selective and very price conscious. Offers are frequently 5/10% below even reasonable asking prices. There is seasonal increase in instructions, but greater interest in sale by auction with the potential for a speedier and more certain sale. Expect more of the same for the rest of the year.

David Oswick FRICS, David Oswick FRICS, Halstead, Essex, 1787477559 - Specialist properties and reasonably priced conversion properties still have a reasonable demand but accurate estimations as to what price the buying public are prepared to pay are difficult with some wildly different valuations being presented to clients by various agents.

David Parish FRICS, Gates Parish & Co., Upminster, Essex, 01708 250033 - Realistically priced properties are selling but buyers remain very cautious. There are growing signs that prices may drop during the next six months.

David Sherwood MRICS, Fenn Wright, Colchester, Essex, 01206 763388 - A very unpredictable market but for sure confidence is sadly absent, and it takes confidence for a stable market. The continuing bad news in the media isn't helping at all, and understandably is making people very cautious when it comes to 'dipping their toes' into the property market. Yes interest rates are still at an all time low but for how long can the Bank sustain it at this level.

David Smith BSc MRICS, Carter Jonas, Andover, Hampshire, 01264 342342 - It remains a buyers market, although there are a few exceptions which will always prove that the market is difficult to read, but generally it shows that good property in the right location will always generate good demand and sell well.

Geoffrey Holden FRICS, Parsons Son & Basley, Brighton, East Sussex, 01273 274011 - Applicant registrations and enquiries have reduced. Lack of finance is still making it difficult for potential purchasers and vendors.

Ian Perry FRICS, Perry Bishop & Chambers, Faringdon, Oxon, 01285 655355 - The market is steady with some signs of prices going up but generally static.

John Frost MRICS, The Frost Partnership, Windsor, Berkshire, 01494 680909 - We have seen an uplift in market activity on the back of asking prices being reduced.

John Frost MRICS, The Frost Partnership, Slough, Buckinghamshire, 01494 680909 - Reduced negative media on the housing market has assisted demand.

John Frost MRICS, The Frost Partnership, Ashford, Middlesex, 01494 680909 - Another quiet month in Ashford. Viewings and new applicants down on May. Sales agreed down on May. Plenty of (low) offers being made but in many cases, vendors are not willing or able to accept.

John Frost MRICS, The Frost Partnership, Gerrards Cross, Buckinghamshire, 01494 680909 - Generally still a fragile market. More price sensitive than ever. Properties priced correctly will get a fair offer within 2 weeks of coming onto the market. Otherwise prices have to be reduced in order to sell. Buyers sensing some desperation and offering very low to get a bargain. More evidence of downsizing.

John Frost MRICS, The Frost Partnership, Amersham, Buckinghamshire, 01494 680909 - Fewer buyers registering and properties sticking on the market so value reductions often needed to sell.

John Frost MRICS, The Frost Partnership, Beaconsfield, Buckinghamshire, 01494 680909 - The balance has now swung to more available properties than potential buyers. Therefore, buyers are negotiating harder. General stock levels now look over valued and will have to be reduced to sell.

John Frost MRICS, The Frost Partnership, Burnham, Buckinghamshire, 01494 680909 - Properties selling close to asking prices where price is correct. However, many properties have come into the market at unrealistic levels giving the wrong impression that houses are not selling.

John Frost MRICS, The Frost Partnership, Staines, Middlesex, 01494 680909 - No movement on the base rate and more products available at higher lending (LTV) is encouraging more buyers back into the market.

John King MRICS, Quinton Scott, Merton, Surrey, 020 8971 6780 - Positive market with a steady supply of new applicants and instructions. Still the lingering doubt over the supply of mortgages remains our prior concern.

Jonathan Bastable BSc MRICS, Strutt & Parker, Newbury, Berkshire, 01635 521707 - Price is key and lots of viewings with few actual sales.

Mark Everett BSc FRICS, Michael Everett & Co., Epsom, Surrey, 01372 273448 - Increasingly price sensitive market with sales action concentrated in middle market price ranges. More instructions available but quality buyers scarce.

Martin Seymour BSc FRICS, Crow Watkin, Reigate, Surrey, 01737 245886 - Sales continue to tick over fairly slowly. There is a general feeling of caution. Mortgages often take a long time to arrange.

Mike Hewson FRICS, Howard Cundey, Lingfield, Surrey, 01342 833333 - A busy month for new sales but also a number of fall throughs - some for very flimsy reasons which is probably just mirroring the general economic uncertainty. Not so much activity in £1m to £2m range.

Peter Fearn FRICS, Keats Fearn, Farnham, Surrey, 1252718018 - Confidence is ebbing and flowing like the tide. Vendors and buyers who are keen one day, often change their minds the next, and vice versa, making trading conditions extremely frustrating. Once agreed, the majority of deals are taking months, rather than weeks to reach exchange, which is exacerbating the situation.

Peter Mockett FRICS, Hilbery Chaplin, Romford, Essex, 01708 732732 - Confidence still at low ebb making buyers wary about taking on large mortgages.

Philip Hiatt MRICS, Your Move Philip Hiatt, east Grinstead, West Sussex, 01342 321142 - The market in June was like the weather, occasional sunny days but with enough wet and windy days to ensure that that the outlook was never that promising. Buyers will buy but at their price not the vendors and many promising offers from sound buyers came to nothing as vendors seem reluctant to acknowledge that the market has changed again in June and uncertain days lie ahead for the property market, just like the weather.

Richard Eshelby FRICS, Latchmere Properties Ltd., Dorking, Surrey, 01306 876 006 - The market continues to improve, albeit gradually.

Robert Green MRICS, John D Wood & Co., Oxford, Oxfordshire, 020 7352 1484 - As we move into the holiday season we have more stock on the market which is causing buyers to relax their approach to buying. Also likely interest rate rises and the volatility in the stock market is affecting confidence. The Oxford city market is still very strong.

Robert Green MRICS, John D Wood & Co., Lymington, Hampshire, 020 7352 1484 - Considerable increase in 'new instructions' and return of competitive interest in some cases. Particular activity in £450 - £750K bracket, but the country house market over £1m - still very patchy.

Sara Allen, William H Brown (Sequence) Ltd., Hertford, Hertfordshire, 01992 583385 - Average applicant numbers but low stock levels creates strong sales from multiple buyers on saleability units.



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Tony Webb FRICS, Trenchard Arlidge, Cobham, Surrey, 01932 864242 - Viewing numbers down - not much sense of urgency from buyers. Too many other agents over-valuing to gain instructions and setting asking prices at record levels. First time buyers absent from market. Most of our buyers now either cash or small mortgage cases.

W J Hartnell FRICS, Simon Matthew & Co., Ingatestone, Essex, 01277 355255 - The market in the last two months has been very slow. It is expected that the sales situation will be slow until late September due to holidays. After September we expect sales to pick up until early December. No increase in prices is expected.

South West

Ben Marshall MSc MRICS, Woolley & Wallis, Shaftesbury, Dorset, 01747 852242 - Market still price sensitive. Increased sales but still shortage of buyers.

Colin Bowden FRICS, Dickinson Bowden, Dorchester, Dorset, 01305 250402 - On a positive note, properties between £300,000 and £400,000 have agreed sales at asking price. On a negative note lots of activity on lower end but not enough sales agreed due to uncertainty in market place.

David Dark FRICS FNAEA, Seldon Ward & Nuttall, Bideford, Devon, 01237 477997 - The market remains very price sensitive. The limited availability of mortgage funding for first time buyers and first time sellers is creating difficulties in the lower sector for the market.

David Lewis, Stags Estate Agents, Totnes, South Devon, 01803 865454 - The gap between asking prices and achieved prices appears to be growing, thereby indicating that prices have recently dropped. Let's hope the summer market brings more buyers out.

David Mackenzie, Carter Jonas, Bath, Somerset, 1225750900 - Only exceptional or extremely good value for money properties are selling well, large levels are coming to the market now and buyers are being picky.

David McKillop FRICS, McKillop and Gregory, Salisbury, Wiltshire, 01722 414747 - A better month than expected with more first time buyer activity. Fewer properties coming onto the market also means that prices have held up better than before. Still some price ranges which are absolutely dead, but generally much better.

Graham Thorne FRICS FCIQB, Thomes Chartered Surveyors, Poole, Dorset, 01202 684004 - The shortage of family housing is creating a shortage which is causing prices to rise.

Ian Perry FRICS, Perry Bishop & Chambers, Cirencester/ Cheltenham/ Fairford/ Nailsworth/ Malmesbury / Tetbury, Gloucestershire, 01285 655355 - The market is steady with some signs of prices going up, but generally static.

J G Waterton MRICS, Strutt & Parker, Salisbury, Wiltshire, 01722 344011 - June started well with a good level of instructions stimulating plenty of interest. Buyers however are very cautious and offering well under guide. As the month has continued activity levels have fallen leading to a feeling that summer has come early.

Jeff Cole MRICS, Cole Rayment & White, Wadebridge, Cornwall, 1208813595 - The market continues to be tough but we have continued to agree sales where vendors have been realistic with their asking prices.

John Cowley FRICS, Crisp Cowley, Bath, Somerset, 01225 789333 - June has been a very busy month, but not yielding the same level of sales as May.

Mark Annett FRICS, Mark Annett & Company, Chipping Camden, Gloucestershire, 01386 841622 - We have been very busy but there are now signs of a slow down and lack of confidence which will impact on prices. It is too early to tell yet.

Michael Joyce MRICS, Cooper & Tanner, Frome, Somerset, 01373 455060 - Unless banks lend to first time buyers the market will grind to a halt by Christmas.

Peter G May, Minster Property Management Limited, Wimborne, Dorset, 01202 842812 - There is a slight increase in market activity but this is assumed to be seasonal and is not at a level first hoped for. This does not bode well for the autumn and end of the year where I expect the weakness of the market to be fully exposed.

Richard Addington MRICS, Savills, Exeter, Devon, 01392 455755 - Vendor expectations are mostly above what buyers are prepared to pay without any pressure to reach compromise there is currently a stalemate.

Roger Punch FRICS, Stags, Plymouth, Devon, 01752 223933 - Following a disappointing May, June has proved to be a far more positive month with significantly increased negotiated sales. General acceptance of adjusted price levels by vendors, and increased confidence of prospective purchasers is the reason. There remains a good stock of properties available for buyers to select from, which should turn into a good third quarter of the year.

Simon Cooper FRICS, Stags, Exeter, Devon, 01392 255202 - Buyer confidence is still fragile but when properties are priced correctly, sales can take place quickly, as has been seen in the last month with the best number of new sales in June for the whole of 2011. Quality estate agency produces results.

Stephen Morris MRICS IRRV, Davies & Way, Keynsham, Bristol, 01225 400400 - A busy seasonal market - but flat as far as prices are concerned.

William Morrison MRICS, Knight Frank, Exeter, Devon, 01392 423111 - Prices still too high.

Wales

D E Baker FRICS, David Baker & Company, Penarth, Vale of Glamorgan, 029 2070 2622 - It has been very quiet through June, fewer enquiries, less sales and fewer new properties coming onto the market. I cannot put my finger on why it has become quiet, it is a little uncomfortable.

David K. Jones FRICS, Jones & Redfeam, Rhyl, Denbighshire, 01745 351111 - The market remains up and down, being more down than up. Lower priced properties are getting interest with realistically priced sellers having a realistic chance of a sale. Consumer confidence remains fragile and we could do with a super injunction on any more bad news.

David Owen FRICS, Russell Baldwin & Bright, Rhayader, Powys, 01597 810457 - We have seen an increase in interest at the lower end of the market with the re-emergence of buy to let investors and even first time buyers.

John Caines FRICS, Payton Jewell Caines, Bridgend, Wales, 01656 654328 - The market remains much the same as last month.

John Nicholas MRICS, J J Morris, Haverfordwest, Pembrokeshire, 01437 760440 - The market is very quiet with new buyer enquiries at their lowest level for some time. Price expectations are still reflective of the fact that some vendors are prepared to hold out for a certain price.

Kelvin Francis FRICS, Kelvin Francis & Co., Cardiff, South Glamorgan, 029 2076 6538 - More vendors are placing their properties on the market and the level of viewings has also increased. However, this being reflected in a great increase in the number of offers forthcoming. Buyers are taking more time to decide, having a wide range to choose from and first time buyers are still having difficulty in obtaining mortgages.

Paul Lucas FRICS, R.K. Lucas & Son, Haverfordwest, Pembrokeshire, 01437 762538 - In the last month a number of properties have been sold well below expected price levels, and indeed below value. Confidence in the market remains poor.

London

A W Griffith FRICS, Robert Sterling Surveyors LLP, Walthamstow, Waltham Forest, 0845 838 0930 - Stagnant market at present, unusual for this time of year, and a little worrying coming into the quieter summer months. Lack of lending still the driver of this ghost town.

Brendon Thomas MRICS, MAP Chartered Surveyors Ltd, London, City/ Tower Hamlets/ Hackney/ Newham/ Southwark, 8456344187 - Parts of London are very buoyant with demand outstripping supply. This is putting upward pressure on values. The Olympic effect has kicked in also, in certain areas.

Charles Puxley, Jackson-Stops & Staff, Chelsea, London, 020 7581 5881 - Central London suffers from a distinct lack of sellable instructions due to unrealistic expectations of vendors. As such there are more off market deals being done, where vendors want little fuss and agents are able to place individual buyers. At least this keeps turnover ticking along. No sign of more stock becoming available.

Craig Newell BSc MRICS MCIArb, Craig Sheehan, West Kensington, London, 020 7385 5020 - An ongoing shortage of stock is maintaining slight upward pressure.

James Perris, BSc MRICS, De Villiers Chartered Surveyors, London, Central London, 020 7887 6009 - Continued strong interest from overseas buyers with some premiums being achieved for prime Central London stock. This demand, at present, is showing no signs of slowing and may put further upward pressure on pricing further isolating prime Central London property from the rest of the market.

James Wilson DipSurv MRICS FCIARB, W A Ellis, Knightsbridge & Belgravia, London, 020 7581 7654 - The market surged forward in the spring with purchasers keen to complete sales prior to the increase in Stamp Duty Land Tax. Whilst the market between £1m and £3m is busy there are signs that some of the larger houses are carrying over ambitious price tags.



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Jeremy Leaf BSc FRICS, Jeremy Leaf & Co., Finchley, Barnet, 020 8446 4295 - The shortage of property for sale - especially older 3 & 4 bedroom family houses - has meant prices have remained fairly stable in the past month. More buyer interest from overseas in particular together with a marginal relaxation in lending criteria has contributed to an increase in the number of sales agreed. Demand for brand new homes and land to put them on has continued strongly.

John King MRICS, Quinton Scott, Wimbledon, London, 020 8971 6780 - Busy start to the month but it has tailed off due to tennis tournament and greater traffic.

Keith Barnfield FRICS, Barnfields, Enfield, Middlesex, 020 8363 3394 - There is a good level of interest in the mid-range properties but the properties below £250,000 are attracting less attention. We are still short of first time buyers.

Kim Turner, Bective Leslie Marsh, London, Kensington, 0207 7954288 - We are currently experiencing a buoyant market in Kensington and we personally are dealing with a substantial number of serious international and local buyers (the majority of whom are cash purchasers) who are actively looking for larger homes (£3m-£38m). Our strongest international house buyers are from Hong Kong and Malaysia.

Luke Pender-Cudlip MRICS, Knight Frank, Wandsworth/Balham/Clapham, London, 020 8682 7777 - Overpriced stock is sticking. Well priced houses are still selling although the level of enquiries is down for this time of year.

Robert Green MRICS, John D Wood & Co., Chelsea, London, 020 7352 1484 - The continued demand from overseas buyers is driving the market, in a period where stock levels are very low. Many potential sellers will not risk marketing their property for fear of not finding another property to buy. The best properties are regularly attracting multiple bids. Flats are doing particularly well, as overseas buyers value the convenience and security that they afford, over houses.

Robert Green MRICS, John D Wood & Co., Wandsworth, London, 020 7352 1484 - Vendors have high expectations, which often are not matched by purchasers. Surveyors are being very cautious with valuations.

Robert Green MRICS, John D Wood & Co., North West London, London, 020 7352 1484 - A lack of stock and strong demand is keeping prices firm and we cannot see any reason for this to change in the next few months. The HS2 train is becoming an issue for many prospective buyers, but it has not yet made a significant impact on our market. This may change.

Robert Green MRICS, John D Wood & Co., South Kensington, London, 020 7352 1484 - After the slowdown of April, the spring/summer market was quite slow to start with but has proven to be relatively strong, particularly in the sub £1m bracket which might indicate that the increase in SDLT has cooled buyers in this upper bracket. That said prime property in good locations is attracting significant interest and almost always achieving sealed bids. However, this is almost certainly as a result of a lack of good stock.

Stephen Whitley FRICS, R Whitley & Co., West Drayton, Middlesex, 01895 442711 - The number of sales being achieved continues to improve although we anticipate the market slowing down as the holiday season approaches.

Scotland

Graham+Sibbald, Stirling, Stirlingshire, 01786-463111 - The level of stock on the books of many agents is higher than normal yet there remains a steady flow of Home Report refreshes which is encouraging. The key to achieving a sale within reasonable timescale is a guide price which reflects prevailing market conditions. A property in a good location will always sell if aspirations on price are realistic.

Alasdair Seaton BSc MRICS, D M Hall, Dunfermline and Environs/ Kinross, Scotland, 01383 621262 - Prices still stable. Properties still selling when priced properly. Uncertainty as we enter the summer.

Alexander Inglis BA MRICS, C/KD Galbraith, Scottish Borders, Scotland, 01573 224244 - The market appears to be busier this year than for the last few years and sellers are now generally realistic with their expectations. However, things are still patchy and concerns over jobs and the economy remain. The better properties continue to sell so long as they are sensibly priced.

Andrew MacFarlane BSc MRICS, Graham + Sibbald, Hamilton, Lanarkshire, 1698422500 - Whilst market conditions remain changeable like the Midsummer weather, June has been a good month for Home Report instructions. It has become apparent that many sellers are now inclined to contact ourselves, as Chartered Surveyors, to seek advice before considering placing their property on the market. Market conditions are certainly difficult and it is crucial in today's market, given the choice of properties available, that in order to achieve best price in the marketplace that the seller ensures the property is maintained in a good overall condition, is realistically priced and the Home Report has been prepared by a firm of surveyors, who are on the panel of all of the mainstream lending sources and where necessary can be relied upon by the purchaser for mortgage purposes.

Chris Highton FRICS, Allied Surveyors Scotland plc, Selkirk, Scottish Borders, 01750 724170 - After a flurry in spring, things seem to have settled back, with activity reducing again. Although we would expect to see a tail off towards the summer holidays, activity seems especially subdued just now. The top end of the market remains relatively resilient and activity there seems better, but the lower end has very little activity.

Darroch Robertson MRICS, Graham + Sibbald, Aberdeen, Aberdeen/Aberdeenshire, 01224 625024 - After increased market activity in spring 2011, the past month has seen a slight slowing in market activity. It is still the case that properties presented in a walk-in condition typically sell in a shorter period of time and generally achieve premium prices. This has been reflected in an increased level of closing dates. However, it should be noted that properties in need of a degree of upgrade and repair are continuing to remain unsold for lengthening periods of time. It is clear that seasonal trends continue to have an overriding influence on market activity which has been reiterated by a slight reduction in properties entering the resale market during the past month. It is hoped that some of the spring trading momentum continues into and through the summer months.

Gordon Macdonald FRICS, Allied Surveyors Scotland, Aberdeen, Aberdeenshire, 01224 571163 - The market in and around Aberdeen continues to show good levels of activity, relative to other parts of Scotland whilst being less intense than the spring/early summers of past years. Sensibly priced properties are mostly selling whilst at the very top end of the market demand for the best quality properties and top locations is intense with competition resulting in very high price levels. Starter flats remain tough to sell and most property beyond a 20 mile radius is proving difficult to sell due to increase supply and some reluctance by sellers to accept realistic pricing.

Graeme Lusk BSc MRICS, Graham + Sibbald, Kilmarnock, Ayrshire, Arran and Dumfries & Galloway, 01563 528000 - Home Report instructions were up considerably in June to around normal market levels. A number of agents are reporting increasing levels of enquiries with a few homes even selling within a couple of weeks of being brought to the market. It is still a great time to consider moving as many properties represent good value for money, even in today's climate.

Grant Robertson MRICS, Allied Surveyors, Glasgow, Scotland, 0141 330 9950 - The market slowed in Glasgow in May-early June and with the holidays upon us agents are already pushing for price reductions from owners. This reflects last years model when activity in the first two quarters failed to carry into the second half of the year. The process has, however, started earlier than before and a further reduction in values seems inevitable now.

Ian Morton BSc(Hons) MLE MRICS, Bradburne & Co., St Andrews, Scotland, 01334 479 479 - Entering summer holiday period so we expect sales to slow on top of an already quiet market. Over-supply of good properties will allow purchasers to negotiate good deals.

Ian R Croall BSc MRICS, Graham and Sibbald, Falkirk, -, 01324 638377 - Significantly more activity in recent weeks after a somewhat quiet start to the spring period. Transactions / secured purchase numbers up, along with increased demand for Home Reports reflecting more stock coming to the market.

Kevin J Macdonald MRICS, Graham + Sibbald, Inverness, Inverness-Shire, 01463 236977 - The property market in Inverness and the surrounding area continues to be relatively stagnant ahead of the forthcoming summer holiday period which itself has proven to be a traditionally slow time. Lack of activity in sales is largely due to the volume of properties continuing to come to the market at a greater rate than the number selling and the resultant effect is prices being driven down as buyers find themselves in increasingly strong negotiating positions. Purchase prices are generally still below asking prices and valuations with the majority falling within a range of 5-10%. Ongoing uncertainty and difficulties obtaining mortgages seem to continue to affect many purchasers with reports of more sales than normal falling through due to finance problems.

Kevin Murchie BLE MRICS, Graham and Sibbald, Edinburgh, Lothians, 1312251559 - As we approach the traditional summer holiday period there appears to have been a quieting down of general activity within the housing market which in comparison with other years has come earlier than expected. However the unpredictable nature could mean a change in the pattern of activity through to September.

Graham & Sibbald, Glasgow, Glasgow and West Scotland, 0141 332 1194 - The same old pressures/ features continue to be prevalent in the Greater Glasgow area, with many areas seeing demand lower than supply levels. We continue to see new introductions to the market that are sensibly priced selling quicker than old stock, where vendors are still holding out for the very best price. I continue to advise sellers of homes to be realistic of the outcome, and ensure they 'engage' with buyers to reach a mutually satisfactory outcome. I do think that given we really have not seen the usual Spring boom, that activity levels are likely to stay fairly steady over the summer months, at levels similar to what we have seen in recent times.

Daragh Mallon MRICS, Best Property Services, Newry, County Down, 2830266811 - Plenty of sales activity at the lower end of the market from both owner occupiers and investors. Lack of funding/economic uncertainty remains key issues for mid to high end properties with few completed transactions.

Tom McClelland FRICS, McClelland Salter, Lisburn, Co Antrim, 028 92674121 - Mixed news as some commentators are expecting 20,000 jobs to disappear from the NI public sector but recent NI Housing Executive research shows increasing affordability for FTB buyers once the deposit hurdle is cleared.

Paul J Duncan MRICS, Graham and Sibbald, Kirkcaldy, Fife, 01592 266211 - The market remains fairly unpredictable but in recent weeks we have seen an increase in activity with a reasonable number of properties currently under offer. There are still good levels of demand for new build properties with builders now having to offer fewer incentives to attract interest.

Peter Bennet, Graham & Sibbald, Dunfermline, Fife, 1383732030 - The signs have been more encouraging since the Easter period with more sales and good quality stock coming on to the market. Nevertheless, it is without doubt still a buyers market, particularly for people looking to purchase investment properties. Certain areas of the property market remain strong (good quality traditional and period style).

Peter McEachran FRICS, Graham and Sibbald, Paisley and West of Scotland, Renfrewshire, 0141 889 3251 - Houses which have been on the market for some time are selling, usually as a result of price reductions. The first time buyer market remains challenging because of the requirement for larger deposits. Agents report reduced numbers coming to the market but this is expected to improve as the holiday season passes. September and October should see an upturn in the market.

Richard A Clowes MRICS, DM Hall LLP, Galashiels, Scottish Borders, 01896 752009 - A busier month with signs of a slight increase in activity in the marketplace.

Northern Ireland

Bronagh Boyd MRICS, Digney Boyd Ltd., Newry, Co Down, 028 30 833 233 - Property prices are at the lowest level on record and there is availability of some lending in the market place. First time buyers and investors are increasingly keener to buy. Vendors are realistic on price.

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