

# RICS UK Housing Market Survey

**August 2011**

## Economic uncertainty weighs down on activity levels

- **House prices continue to decline**
- **Price expectations deteriorate**
- **Regional divergence widens with London pulling away**

The August RICS UK Housing Market Survey indicates that more respondents are reporting price falls rather than rises. The headline house price net balance remained in negative territory, edging down from -22 to -23 i.e. 23% more surveyors recorded falling rather than rising prices. That said, of those reporting price falls, 75% did so in the 0 to -2% range.

Respondents were additionally asked this month to state the main factors adversely affecting activity in the housing market. Interestingly, the most cited factor was the general level of economic uncertainty (78% identified this factor), with lack of mortgage availability coming in a close second (66%). Regionally, surveyors in London most cited lack of stock (74%) as a reason for the subdued housing market. However, in Northern Ireland where price falls have been particularly severe, fear of further declines was the most cited factor.

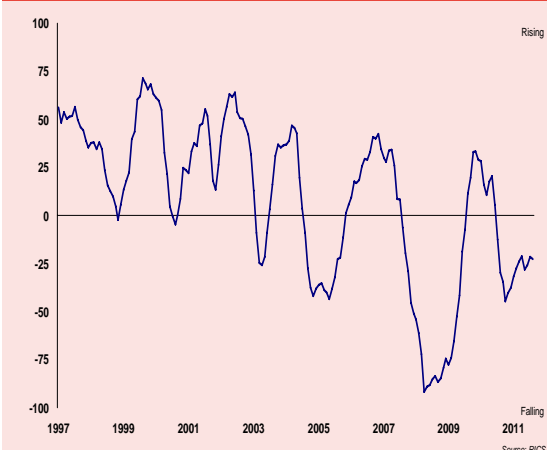
As for demand, new buyer enquires declined in August, with the net balance turning slightly negative (-3). Meanwhile, new vendor instructions remained flat during the month.

Activity levels were broadly flat in August, with the average number of sales per surveyor (branch) at 14 (a 26 month low). Also, the average amount of stock on surveyors' books fell in August by 4.6% to 67, with anecdotal evidence from surveyors suggesting many vendors are taking their properties off the market until Autumn. Because stocks fell more than sales, the sales to stock ratio increased from 20.2% to 20.9% but still remains well below its long run average of 33.4%. This suggests considerable slack remains in the market.

Regionally, London house prices continued to increase, with the net balance rising to a 15 month high (+39). East Anglia and the West Midlands saw the most severe price declines. Outside of England, Scotland saw the house price net balance fall deeper into negative territory and in Northern Ireland, the net balance also deteriorated.

Surveyors have become more pessimistic about future prices, with the price expectations net balance falling from -13 to -23. Sales expectations remain positive, with the net balance edging up from +16 to +17.

**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 homes on books	Completed sales*
	Rise %	Same %	Fall %	Balance**	Balance**	-----Average per Surveyor-----	
	-----Not Seasonally Adjusted-----				-----Seasonally Adjusted-----		
Jun-11	10	58	32	-22	-26	70	15
Jul-11	10	57	32	-22	-22	70	14
Aug-11	11	53	35	-24	-23	66	14

\* 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 = **271 (Covering 410 offices)**


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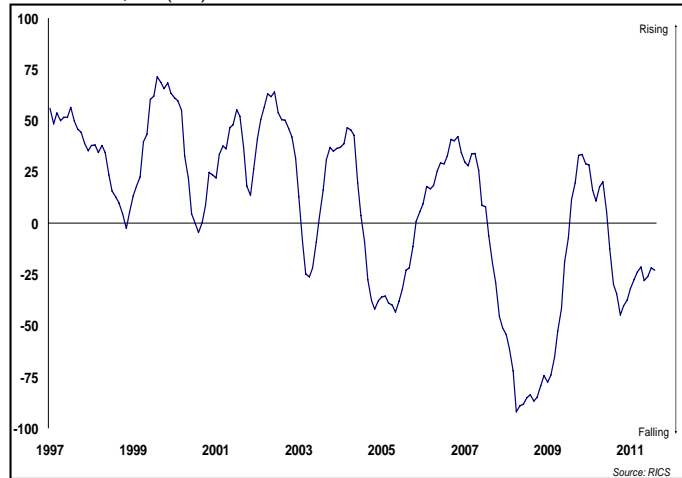
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## National information

### Prices - England and Wales - change over past 3 months

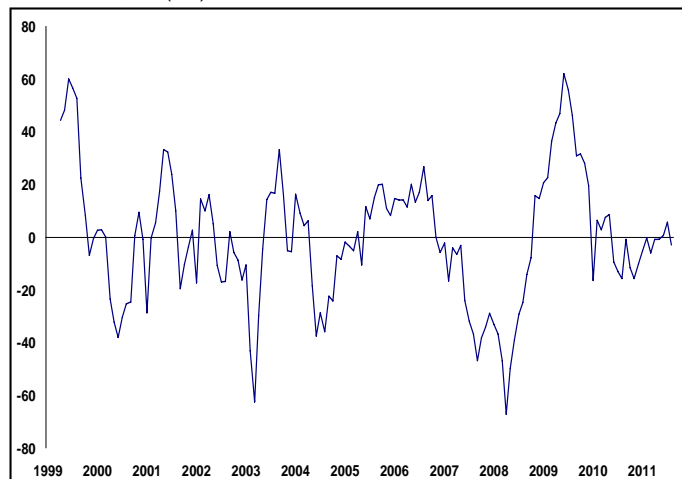
Net balance, % (SA)



The price net balance remained broadly the same in August, moving from -22 to -23.

### New buyer enquiries- England and Wales - change over past month

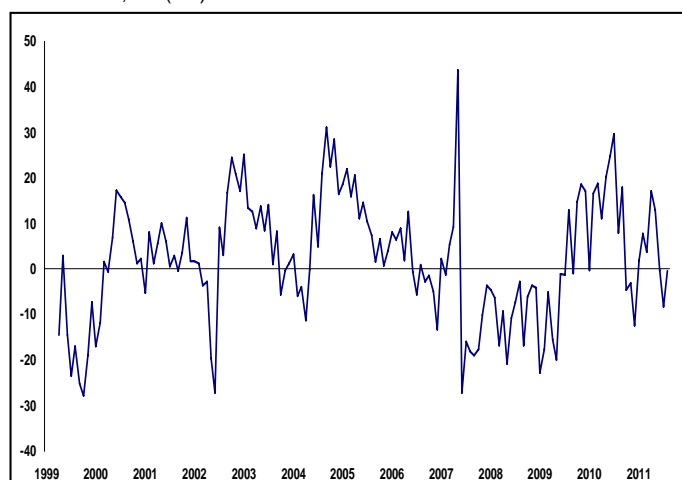
Net balance, % (SA)



The new buyer enquiries declined during the month, with the net balance falling from +8 to -3.

### New vendor instructions - England and Wales - change over past month

Net balance, % (SA)

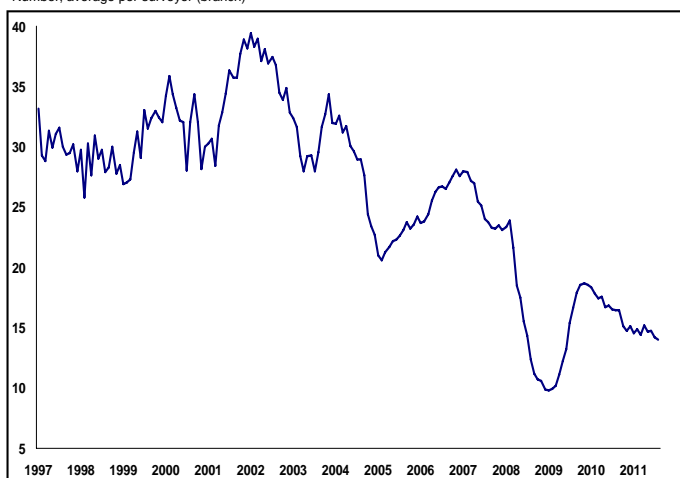


New vendor instructions net balance edged up in August, rising from -8 to 0.

## National information

### Property sales in England & Wales, during last three months

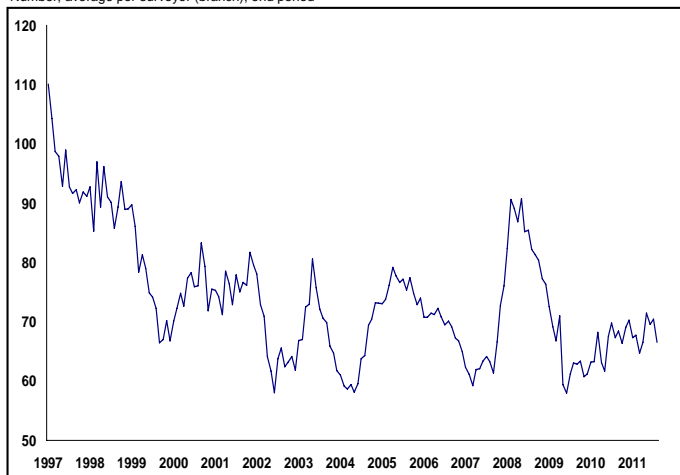
Number, average per surveyor (branch)



The average number of sales per surveyor (branch) declined by 1.4% to 14, a 26 month low.

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

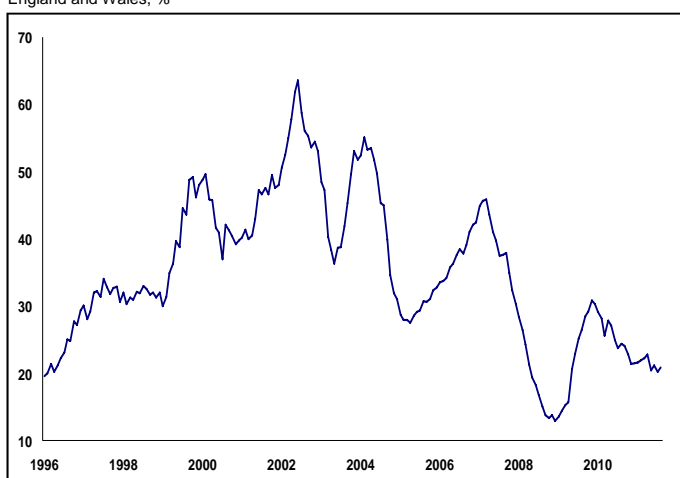
Number, average per surveyor (branch), end period



The average amount of stock on surveyors' books declined by 4.6% to 67.

### Ratio of sales to unsold stocks on surveyors' books

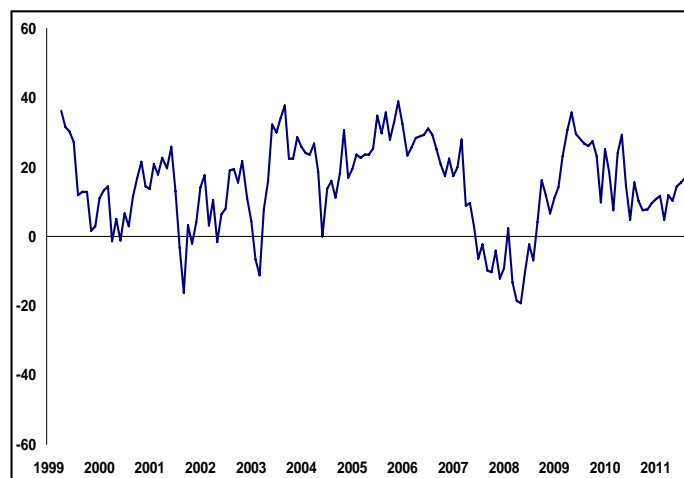
England and Wales, %



The sales to stock ratio edged up in August, rising from 20.2% to 20.9%.

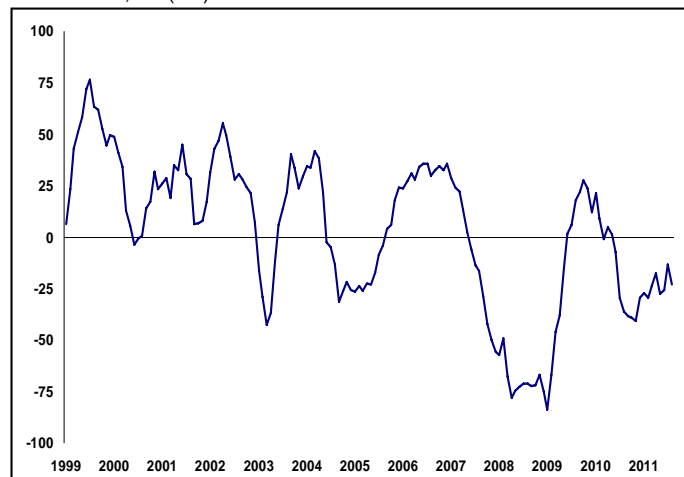
## National information

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



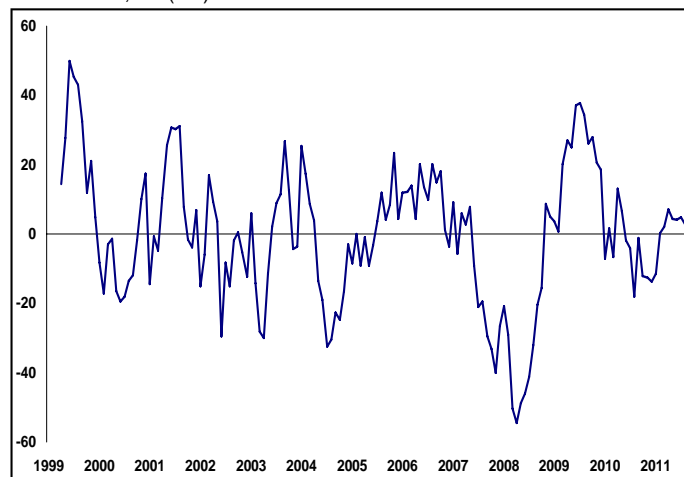
**Sales expectations remain positive, with the net balance moving from +16 to +17.**

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



**Price expectations deteriorated in August, with the net balance declining from -13 to -23.**

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



**Newly agreed sales remained broadly flat during the month, with the net balance edging down from +5 to +3.**



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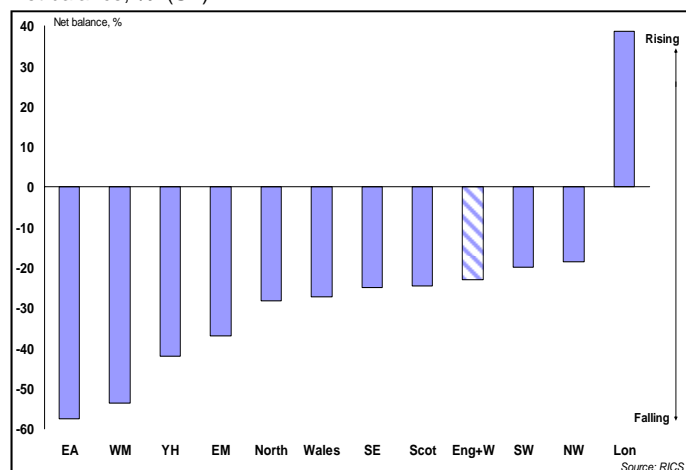
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## Regional comparisons for the current month

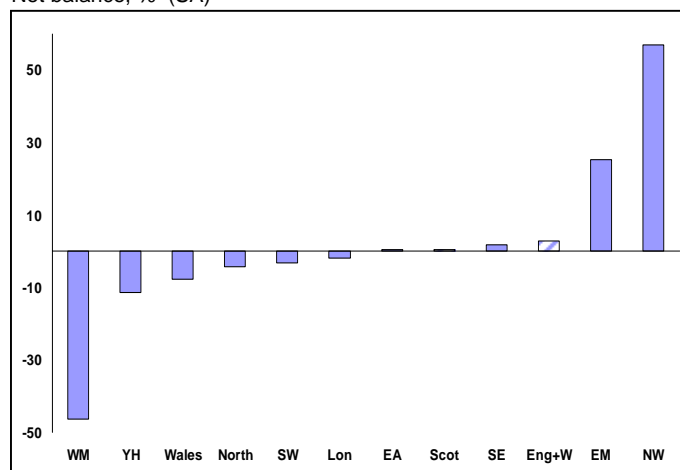
### Prices - England and Wales - change over past 3 months

Net balance, % (SA)



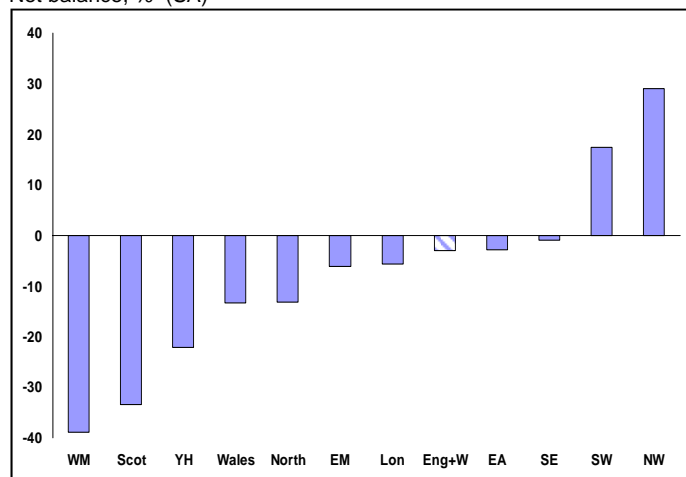
### Newly agreed sales - England and Wales - change over past month

Net balance, % (SA)



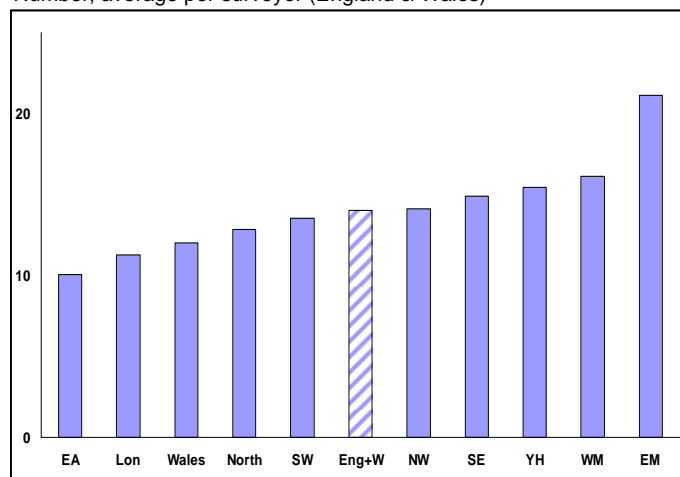
### New buyer enquiries- England and Wales - change over past month

Net balance, % (SA)



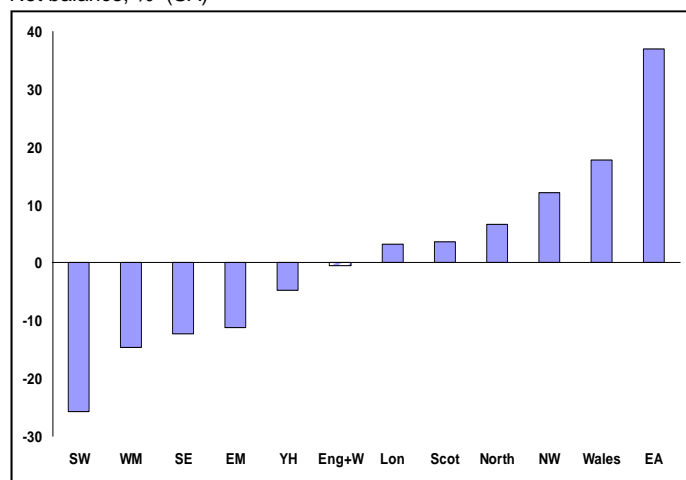
### Completed sales per surveyor, over past 3 months

Number, average per surveyor (England & Wales)



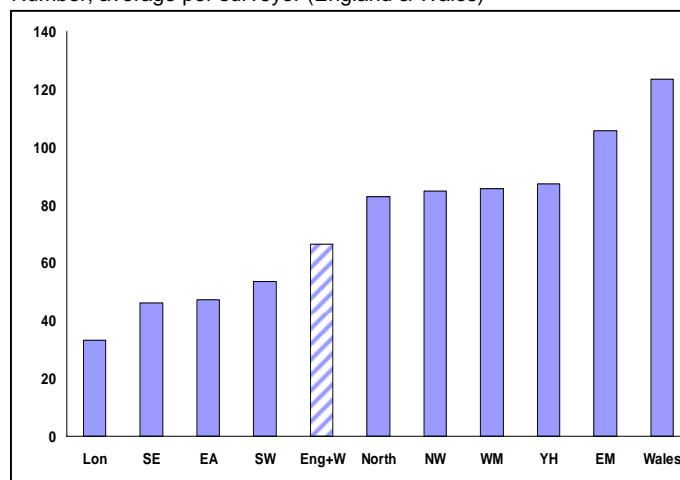
### New vendor instructions - England and Wales - change over past month

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

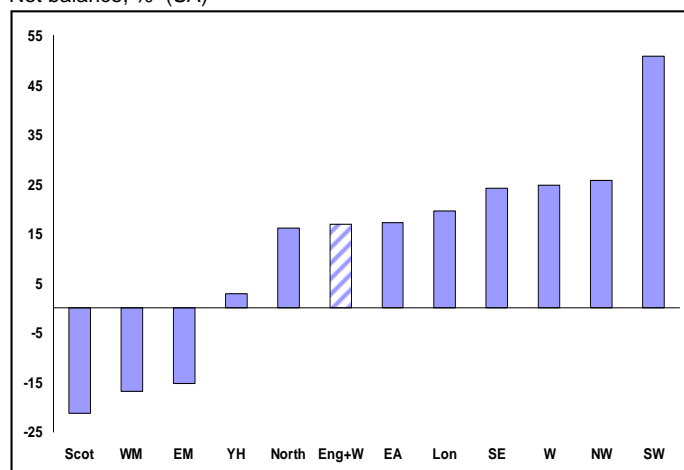
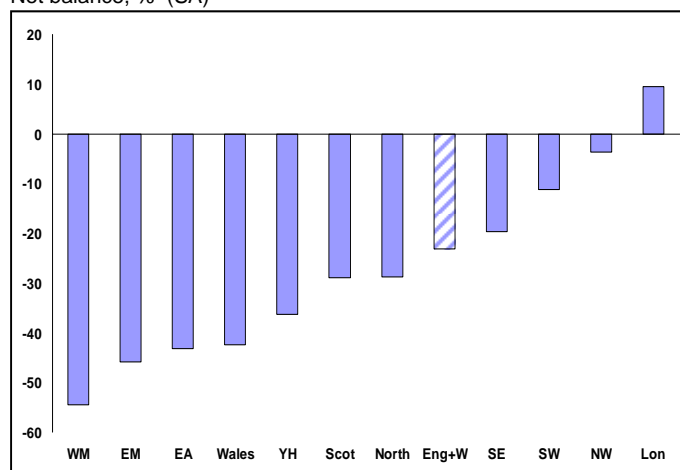


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## Regional comparisons for the current month

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)

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## 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	7	66	20	7	0	0	-20	
Yorkshire & Humberside	0	0	0	1	55	31	6	7	0	-43	
North West	0	0	0	6	76	15	3	0	0	-13	
East Midlands	0	0	0	6	44	38	6	6	0	-44	
West Midlands	0	0	0	1	36	40	21	1	1	-63	
East Anglia	0	0	0	7	24	51	13	3	2	-62	
South East	0	0	1	5	66	24	2	1	0	-21	
South West	0	0	0	2	73	23	1	0	0	-22	
Wales	0	0	0	9	49	30	12	0	0	-33	
London	0	0	5	44	40	6	5	1	0	37	
Scotland	0	0	0	7	64	21	4	3	0	-21	
Northern Ireland	0	0	0	0	49	29	12	10	0	-51	

\* Not Seasonally Adjusted

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



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## Chartered surveyor market comments

## North

Ed Alder BSc(Hons) MRICS, Gleeson Developments Ltd, Sunderland, Tyne & Wear, 0191 5370070 - Mortgage availability remains the key issue for first time buyers/lower end of the market. Rise in private rent is due to lack of deposits to purchase homes.

Peter M Hayward FRICS, Hayward Tod Associates .co.uk, Carlisle, Cumbria, 01228 810300 - August, a quieter holiday month, has proved far more busy with a good number sales to proceedable buyers. Many who need to move in these times, and who can comfortably cope with a move and all it entails, now fully recognise the need to firstly sell prior to looking. What the autumn will bring is another matter.

Sam Gibson, Strutt & Parker, Morpeth, Northumberland, 01670 516123 - Stock market and double dip uncertainty combined with school holidays causing issues with regard to buyer commitment.

Stuart T Allan FRICS, Broadley & Coulson, Bishop Auckland, Co. Durham, 01388 602656 - There is still a major problem with first time buyers unable to obtain mortgages at reasonable rates unless they have substantial deposits. This reflects itself throughout the housing market resulting in lower sales volume compared with previous years and downward pressure on prices and sales taking a long time to achieve. Houses in good condition still continue to sell.

## Yorkshire &amp; Humberside

Alex McNeil MRICS, Bramleys, Calderdale, Halifax, 01484 530361 - I do not see any stimulus to the economy or market for housing and with personal debt increasing and savings now minimal, I predict an increase in default rates. With incomes falling it is inevitable that house prices still have some way to fall to become affordable.

Alex McNeil MRICS, Bramleys, Huddersfield, West Yorkshire, 01484 530361 - The continued economic volatility and uncertainty, coupled with prospects of a further recession has produced a benign market. The difference between this year and the last is that there was more optimism last year that things would improve whereas now there is a realisation that there are further years of difficulty ahead.

Ben Hudson MRICS, Hudson Moody, York, North Yorkshire, 01904 650650 - A busy summer considering time of year, riots and turmoil in the stock markets.

David Pank FRICS, Manning Stainton, Leeds, Yorkshire, 01172 555438 - The lack of mortgages for first time buyers remains a constraint. A lack of equity for home owners is equally damaging as they are unable to obtain a new mortgage.

Edward Waterson BSc FRICS, Carter Jonas, York, North Yorkshire, 01904 558201 - Buyers remain cautious, tending to be drawn by price reductions and/or the dream house. Provided vendors remain realistic their chances of selling remain good. If they try to counter the negative sentiment with a bullish price, buyers will simply sit back.

Francis Brown FRICS, Norman F Brown, Richmond, North Yorkshire, 01748 822473 - Market continues to remain depressed. Economic uncertainty contributing to a strong buyers market.

Ian Adams MRICS MEWI RICS Registered Valuer, Consultant Stanifords & Miller Metcalfe Ltd, Hull, East Riding of Yorkshire, 7703329933 - Loss of Halifax 1st time buyer products/ Mortgages will not help lower end market and increase in buy to let mortgage products will create a larger letting sector.

Ian Briggs FRICS, Dacre, Son & Hartley, Ilkley, West Yorkshire, 01943 600655 - Underwhelmed with the market of 2011 and with the imminent onset of autumn. Many sellers are now contemplating 'hibernating' their properties over winter or letting - which could usefully reduce unsold stock levels.

John E Haigh BSc MRICS FAAV, Lister Haigh, Knaresborough, North Yorkshire, 01423 860 322 - The state of the economy again.

John Francis FRICS, Crapper & Haigh, Sheffield, South Yorkshire, 0114 272 9944 - Attractively priced properties still attract interest, but sales in general are slow and there are still more sellers than buyers.

Kenneth Bird MRICS, Renton & Parr, Wetherby, West Yorkshire, 01937 582731 - Quiet August with traditional summer holidays. Shortage of new instructions but those that are coming on the market are attracting positive interest from genuine proceedable buyers.

M J Hunter MRICS, Grice and Hunter, Doncaster, South Yorkshire, 01302 360141 - As usual August has been subdued. Interestingly there has been a marked decline in instructions and this reduction in stock may help sales in September/October.

Michael Stephenson MRICS, Joplings Estate Agents, Thirsk, Yorkshire, 07540 691652 - We have seen properties realistically priced are generating a high amount of interest, leading to offers and sales.

Richard J Graves FRICS, D. Dunk, Lewis & Graves, Bridlington, East Yorkshire, 01262 672576 - August has been our best month for agreed sales since September 2009. The only explanation I can see for this is vendors are becoming more realistic with prices and accepting selling to buy in the same market makes little difference. Pity the poor owners who bought at the peak with large mortgages.

Tim Brown MRICS, George F White LLP, Bedale, North Yorkshire, 01677 425301 - Property must be priced realistically if it is going to sell this year or in the future. The sooner vendors come to terms with this the better. Too many agents continue to set unrealistically optimistic guide prices in order to gain instructions, but are doing their clients no favours by doing so.

## North West

Andrew Holmes BSc (Hons) Dip Surv MRICS, Carter Jonas, South Lakeland, Cumbria, 01539 814908 - A moderate month with buyer activity remaining steady. Viewings are increasing steadily however with the high volume of available properties on the market buyers have much more choice. Overall an encouraging summer period.

Brian Boys MRICS, B & E Boys Ltd., Rossendale, Lancashire, 01706 211 368 - Market still flat, hampered by lack of mortgages especially for first time buyers as well as critical valuations when offered from mortgage valuers.

Brian Jackson FRICS, Ellis & Sons, Southport, Merseyside, 01704 534171 - The current holiday period has shown a reduction in enquiries and viewings, and therefore this month we would expect a reduction in agreed sales.

Chris Cockwill BSc (Hons) MRICS, Cockwill & Co., Ormskirk, Merseyside, 01704 827075 - Upper market seeing more enquiries. Lower end market remains very tight due to restrictive mortgage/negative equity.

Chris Cockwill BSc (Hons) MRICS, Cockwill & Co., Southport, Merseyside, 01704 827075 - Most properties for sale relate to new development. Purchaser enquiries are more likely to convert to offers/exchange if the developer offered part exchange. Without it the market/product does not move.

Derek Coates MRICS, Venmore, Liverpool, Merseyside, 0151 236 0301 - The market remains sluggish due to underlying economic factors and lenders reluctance to relax unreasonable lending criteria. Lenders continue to be too strict and inflexible. My firm recently sold a flat in Liverpool City Centre with the benefit of a 90% loan. When lenders realised the flat was only 5 years old the deposit rose to 15%. Had the flat been 6 years old the deposit would have remained at 10%. Despite all pleas for common sense to prevail the lenders would not relent and the deal fell through. I remain unconvinced that a 5 year old flat is a more risky investment than a 6 year old flat.

John Halman FRICS, Gascoigne Halman, Wilmslow, Cheshire, 1625460344 - August sales were significantly better than previous year although activity levels remain low. There is a little more optimism than we have experienced in a long time.

John Robinson FRICS FAAV, Whittaker & Biggs, Congleton, Cheshire, 01260 274224 - There is limited confidence in the market due to the economic climate. First time buyers struggle to gain a mortgage due to deposits and repayments. Lenders have introduced new laws which are causing difficulties for potential purchasers.

Jonathan Clayton FRICS BSc, Bentley Higgs & Co., Blackpool, Lancashire, 01253 302928 - The market is still exceptionally unpredictable. One month is quite buoyant and the next very quiet. Individual style properties are receiving the most interest, although on the negative side, banks do not wish to lend money on property.

R C Powell FRICS, Ryder & Dutton, Oldham, Lancashire, 0161 925 3232 - There is still a general lack of confidence caused by economic uncertainty and the consequences of this.

## East Midlands

A C Farnsworth MRICS, Berrys, Kettering, Northamptonshire, 1536532373 - The housing market has been sluggish over the past three months with the volume of sales decreasing, buyers are caught in the mortgage famine and increases in the cost of living and lower salary levels in real terms. Overall confidence in the residential market is low. The next quarter will be a crucial period for the market this year, and an indication of how we will fair next year. The local media have been talking the market upwards, activity and results show completely the opposite. Transactions are fewer and have confirmed the chronic undersupply which affects this region.



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Christopher Shallice FRICS FAAV, Hix & Son, Holbeach, Lincolnshire, 01406 422 777 - Due to the current economic turmoil very little confidence in priority investment in the residential sector is being shown at the present time.

David Hawke FRICS, David Hawke & Co., Worksop, Nottinghamshire, 01909 531450 - A better month with increased sales but static prices.

David Johnson Dip Arb FRICS MCIArb, Readings Property Group Ltd, Leicester, Leicestershire, 0116 204 6157 - Conflicting pressures on the market result in relatively low levels of activity. The debate on the future of property ownership is clouding a market with limited supply - thus price levels stable.

Edward Wreglesworth FRICS, Escritt Barrell Golding, Sleaford, Lincolnshire, 01529 302271 - Confidence is still at a low level with many prospective purchasers experiencing restrictions on mortgage finance. Activity has nevertheless increased to a surprising level during the holiday period of August 2011.

Ian J Shaw FRICS, Escritt Barrell Golding, Grantham, Lincs, 1476590211 - Footfall at beginning of month was very slow with few enquiries. Valuations very quiet.

Mark Newton FRICS, Newton Followell, Grantham, Lincolnshire, 1476584185 - August was the best for three years in terms of sales and instructions, it would appear that the staycationers were out and about buying houses, we expect that the second half of the year will make up for a lacklustre first.

Martin Pendered FRICS, Martin Pendered & Co., Wellingborough, Northamptonshire, 01933 228822 - June, July and August have all been positive sales months. August, normally a quiet period, has been more active than usual with a good supply of new instructions. Certain sectors remain weak but prospective buyers are quite plentiful for other types of property, mainly mature houses.

Neil Hunt FRICS, Wilkins Vardy Residential Limited, Chesterfield, Derbyshire, 01246 270123 - The level of sales has held up remarkably well for the holiday season but prices have dropped slightly. Looking forward to the autumn and winter quarters, it is impossible to see any improvement.

Peter Mountain FRICS, Peter Mountain, Louth, Lincolnshire, 01507 603 366 - Still no light at the end of the tunnel.

R L Bell BSc FRICS, Robert Bell & Company, Horncastle, Lincs, 01507 522222 - July was a month of much greater activity, both in new instructions and in agreeing sales. We are still concerned however about the general economy and the results of strikes and cuts.

Stephen Gadsby BSc FRICS, Gadsby Orridge, Derby, Derbyshire, 01332 296396 - Lack of confidence in house purchase and lack of mortgage funding together with adverse media speculation on house prices continues to ensure market conditions are depressed although realistically priced properties still attracting interest.

#### West Midlands

A Champion FRICS, Halls, Worcester, Worcestershire, 01905 611066 - Negative - Media commentary. Lenders restrictions. Positive - Some see property as good investment long term particularly whilst equities have a difficult period. Buy to let opportunities sound.

Andrew Grant FRICS, Andrew Grant LLP, Worcester, Worcestershire, 07976982742 - Despite the economic difficulties and diminishing household affordability, sale transactions are continuing to exceed last year's performance whilst available stock is slightly down. This shift of equilibrium possibly accounts for price stability.

Andrew Oulsnam MRICS, Robert Oulsnam & Co., Barnt Green, Birmingham, 0121 445 3311 - August has been a much quieter month in all areas although typical for the time of year.

Andrew Perrin MRICS, Fraser Wood Mayo & Pinson, Walsall, West Midlands, 01922 627686 - We are still finding that sensibly/correctly priced properties are selling reasonably quickly, especially at the higher end of the market. There would appear to be a shortage within the general area of higher quality housing and prospective purchasers, in most instances, are not requiring mortgage finance. We are still finding that there is a lack of first time buyers and mortgage availability for them.

Jeremy Dell MRICS FAAV, J J Dell & Company, Oswestry, Shropshire, 01691 653437 - Confidence in the market is still very low with a perception that house prices are still too high.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, Worcestershire, 01562 821600 - Reduced levels of enquiry from prospective purchasers. Pre-sale appraisals consistent with holiday season. Improvement in sales likely in early autumn, although still likely to be much lower. Many prospective vendors reluctant to move house in current economic climate, as feel good factor missing.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, Worcestershire, 01562 821600 - A quieter month for property sales during the holiday season. Reluctance from buyers to commit, still affecting sales. September and October may improve but sales volume unlikely to reach normal levels for time of year.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, Worcestershire, 01562 821600 - Demand for realistically priced property, although buyer still hesitant. Lack of new instructions over the holiday period resulting in reduced levels of enquiry for property which has been for sale for some time. Early autumn likely to result in more property for sale which should stimulate enquiries, however, overall a quieter property sales market.

John Andrews FRICS IRRV, Doolittle & Dalley, Bridgnorth, Shropshire, 01562 821600 - A quieter month likely due partly to it being the holiday season and partly due to the economic uncertainty and prospective purchasers being cautious due to job insecurity. Some improvement likely in early autumn but purchasers still likely to remain cautious. Asking prices need to be realistic.

John Ozwell FRICS, Hunters, Solihull, West Midlands, 01564 771000 - Reasonable sales activity bearing in mind fragile market, however too many 'fall throughs' due to chains breaking down and unhelpful attitude of lenders.

Ryan Williams BSc FRICS, McCartneys LLP, Hay-on-Wye, Hereford, 01497 820778 - Surprising amount of sales given the very limited number of viewers about. More vendor realism and reduced asking prices helping. Slightly fewer instructions and combined with uncommitted vendors taking their houses off the market helping to reduce supply to a more manageable level.

#### East Anglia

Andrew Wagstaff MRICS, Bedfords, Burnham Market, Norfolk, 01328 730 500 - A very typical August - vast numbers of general enquiries but very few of them serious. There are signs of the market slowing down although we will have to wait to see what happens in September before making an accurate comment.

Christopher Philpot BSc FRICS, Lacy Scott & Knight, Stowmarket, Suffolk, 01449 612384 - As we enter the last third of the year, it looks as if any unrealistic asking prices will need realignment, if they are to participate in a market which is still reasonably busy.

David Burr MRICS, David Burr (Long Melford) Ltd., Long Melford, Suffolk, 01787 883144 - The market over the last 6 months for the mid to upper market in Suffolk is at its best since 2007. The benefits of the London 'ripple effect' was evident in our Essex branches early on in the year, the branches in Suffolk have seen the benefits over the last 3 months particularly.

Jeffrey Hazel FRICS, Geoffrey Collins & Co., Kings Lynn, Norfolk, 01553 774135 - There is more activity in the market place. Many more viewers but they are reluctant to confirm offers. Potential vendors are still being tempted by high 'valuations' by cowboy agents. If marketed at the correct price properties are creating interest.

John Pocock, Pocock & Shaw, Cambridge, Cambridgeshire, 01223 322552 - Not much happening and no real sign of what might be coming. The market remains subdued with a reasonable balance between supply and demand, but with rather less of both than we are used to seeing.

Residential Sales (Neil), Connells Estate Agents, Ipswich, Suffolk, 01473 219514 - Usual seasonal changes apply.

Richard Bannister FRICS, Bannister & Company, Felixstowe, Suffolk, 01394 282828 - As a vendor with stocks increasing it is now more difficult to get a buyer so seeing a slight reduction in the selling prices and gradually in asking prices. Slightly more buyers because of bigger selection so volume of sales showing slight increase.

Robert Swiney MRICS, Strutt and Parker, Ipswich, Suffolk, 01473 220428 - August has been the usual difficult summer month with a lack of viewers and lack of offers coming in. Sales that are in solicitors hands seem to take for ever to get through and onto exchange. It will be very interesting to see how the autumn months pan out.

Simon Hickling MRICS FAAV, Maxey & Son, Wisbech, Norfolk, 01945 583123 - Mortgages are still very difficult to obtain leading to lack of first-time buyers (we have not had one for over 12 months).

Stuart Clarke MRICS, Clarke & Simpson, Framlingham, Suffolk, 01728 724 200 - First two weeks of school holidays were good but August has been generally quiet. Vendors now acknowledge the more difficult market conditions and their expectations on prices, on the whole, are more realistic. The forthcoming autumn market will be an interesting acid test as to where we are.



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Tom Goodley MRICS, Strutt & Parker, Norwich, Norfolk, 1603617431 - Prices need to come down by a further 10 - 20%. Some sellers are still thinking they will not lose money if they bought in 2005 - 2007, but they are wrong. Sellers either need to cut prices now by a significant amount or be prepared to grit it out for as long as it takes, which may be 4 to 8 years, but who knows?

### South East

Andrew Miller FRICS, Linay & Shipp, Orpington, Kent, 01689 825678 - Riots, stock exchange collapse, negative press in UK and height of summer holidays dented buyer confidence slightly. However well located, well priced and well presented properties sold well.

Anthony Jamieson MRICS, Clarke Gammon Wellers, Guildford, Surrey, 01483 880900 - Tough market conditions not helped by the holiday season.

Bryan Elphick FRICS, Elphick Estate Agents, Ashted, Surrey, 01372 272321 - Shortage of stock at the right price more of a problem than finding buyers particularly at the bottom end. Low levels of activity but some improvement likely before the late autumn. Agents must resist over valuation for short term competitive advantage.

Clive Rutland FRICS, Rutland Chartered Surveyors, Southampton, Hampshire, 023 8066 3451 - The market is patchy with some sectors relatively active and others extremely quiet. There is a hint of additional mortgage lending but people are mainly sat on their hands waiting to see what happens to their employment and future financial prospects. People are generally being squeezed and there is no appetite to take risks if not required to do so.

David Boyden BSc MRICS, Boydens, Colchester, Essex, 01206 762244 - Incorrect media not helping the matter.

David Nesbit FRICS, D.M.Nesbit & Company, Portsmouth, Hampshire, 023 9286 4321 - A tough holiday affected month, but with a marginal increase in instructions and sales. Confidence remains low as few expect a sudden 'boom' and many wish to remain employed. There is a shortage of properties but a desperate shortage of finance. Cash buyers are in a strong position. Loans for first time buyers are essential.

David Oswick FRICS, David Oswick FRICS, Halstead Essex, Essex, 1787477559 - During the holiday period the interest has been better than expected but there is a definite shortage of unusual or character properties available especially suitable for improvement at the right price.

David Parish FRICS, Gates Parish & Co., Upminster, Essex, 01708 250033 - There has been a significant increase in the number of sales agreed this month which is unusual in the holiday season. This primarily relates to old stock and there is a shortage of new instructions. However, new instructions would be anticipated in the autumn. Price levels continue to remain static in this area.

David Sherwood MRICS, Fenn Wright, Colchester, Essex, 01206 216556 - The market up to £500,000 is undoubtedly where there is the most activity and prices appear to be stable - above though buyers appear to be far more cautious and activity levels and sales are slow.

David Smith BSc MRICS, Carter Jonas, Andover, Hampshire, 01264 342342 - August saw a continuation of 'the stand off' between vendors and good buyers wishing to achieve a discount. Pragmatic vendors however realising that premium prices may not be obtained have accepted realistic offers. So the market continues to turn. Sensible pricing is now essential for sales to be achieved.

Edward Robinson MRICS, Robinson, Maidenhead, Berkshire, 01628 637600 - Still a well-balanced market if a little fragile.

Geoffrey Holden FRICS, Parsons Son & Basley, Brighton, East Sussex, 01273 274011 - Surprisingly August was a busy month for agreeing sales. Good prices achieved on Edwardian period properties, to buyers in rented accommodation or with no related sales.

Ian Perry FRICS, Perry Bishop & Chambers, Faringdon, Oxon, 01285 655355 - We were busier than expected in August. Total sales agreed remain about 5% up on last year.

John Frost MRICS, The Frost Partnership, Ashford, Middlesex, 01494 680909 - A quiet month, even for August. The only properties gaining any interest or offers are where the owners are being realistic with their asking price.

John Frost MRICS, The Frost Partnership, Beaconsfield, Buckinghamshire, 01494 680909 - There is a considerable amount of over-priced property on the market although there are signs now that vendors understand the market is price sensitive.

John Frost MRICS, The Frost Partnership, Burnham, Buckinghamshire, 01494 680909 - July and August can be quieter months due to holidays, however this year has been very disappointing. On the bright side the number of properties coming into the market for September has increased.

John Frost MRICS, The Frost Partnership, Gerrards Cross, Buckinghamshire, 01494 680909 - Towns much busier than village locations. Typical August - okay at beginning quiet at end. Market still very sensitive to pricing.

John Frost MRICS, The Frost Partnership, Windsor, Berkshire, 01494 680909 - The market has been quieter over the summer holidays but those people viewing have been serious buyers which has led to an above average amount of agreed sales for this time of year.

John Frost MRICS, The Frost Partnership, Staines, Middlesex, 01494 680909 - Summer holidays have reduced the amount of viewings and sales.

John Frost MRICS, The Frost Partnership, Amersham, Buckinghamshire, 01494 680909 - Busy month for instructions and new sales and good levels of new buyers registering.

John Frost MRICS, The Frost Partnership, Slough, Buckinghamshire, 01494 680909 - Media statements of doom and gloom in the property market are not helpful. August has been a tremendous month for agreed sales although instruction levels have fallen.

John King MRICS, Quinton Scott, Merton, Surrey, 020 8971 6780 - A quiet summer, pockets of activity, with exchanges up but new instructions down. Hopefully the autumn period will provide a greater level of activity.

Kevin Rolfe MRICS, Aitchison Raffety, Berkhamstead/ Hemel Hempstead/ Watford/ St Albans, Herts, 1442875509 - OK given fact it was holiday season.

Mark Everett BSc FRICS, Michael Everett & Co., Epsom, Surrey, 01372 273448 - Busier than usual for August with buyer activity and sales above average. This has resulted in stocks running low. New instructions needed to maintain improved market conditions.

Martin Allen MRICS, Elgars, Wingham, Canterbury, Kent, 01227 720557 - Uncertainty is undermining the confidence of both buyers and sellers.

Martin Seymour BSc FRICS, Crow Watkin, Reigate, Surrey, 01737 245886 - The market in this area continues to tick over but in a climate of relatively low transaction levels and of no price appreciation.

Peter Fearn FRICS, Keats Fearn, Farnham, Surrey, 1252718018 - Mortgage availability seems to be getting worse as lenders keep changing their lending criteria. A viewer without a written mortgage in principle agreement is pretty much worthless in this climate.

Peter Mockett FRICS, Hilbery Chaplin, Romford, Essex, 01708 732732 - It is a great pity that first time buyers need such a huge deposit, making it completely impossible for the vast majority to buy.

Philip Hiatt MRICS, Your Move Philip Hiatt, East Grinstead, W Sussex, 01342 321142 - Very much a holiday month and hard to draw too many long term conclusions from a short term situation. Activity levels were markedly down on the previous month and business in terms of new listings and sales very hard won. There are some fantastic mortgage deals out there if buyers are happy to commit and lenders free up the purse strings a little. Hopefully the ending of the holiday season will see improved levels of activity.

Robert Green MRICS, John D Wood & Co., Lymington, Hampshire, 020 7352 1484 - August has been busy with many enquiries from holiday makers, but most lack any commitment to buy. September should see greater activity levels.

### South West

Ben Marshall MSc MRICS, Woolley & Wallis, Shaftesbury, Dorset, 01747 852242 - Stock market has made people nervous - we have not noticed a real effect but purchasers seem more wary.

David Dark FRICS FNAEA, Seldon Ward & Nuttall, Bideford, Devon, 01237 477997 - Market remains very price sensitive. Job insecurity and lack of available mortgage finance affecting lower and mid market sectors.

David Mackenzie, Carter Jonas, Bath, Somerset, 01225 750900 - Recently the problems with the American economy and the riots in the UK has certainly had a negative impact causing buyers and sellers concern, however, the summer market is always subdued so we'll see what the autumn brings.

David McKillop BSc FRICS, McKillop & Gregory, Salisbury, Wiltshire, 01722 414747 - A very quiet month. Very few instructions and sales very difficult to put together with low offers coming in on most properties. This week has been better. Excellent month for exchanges reflecting good May and June. Hope things improve in September.

Ian Perry FRICS, Perry Bishop & Chambers, Cirencester/ Cheltenham/ Fairford/ Malmesbury/ Nailsworth/ Tetbury, Wiltshire, 01285 655355 - We were busier than expected in August, total sales agreed remain about 5% up on last year.

J G Waterton MRICS, Strutt & Parker, Salisbury, Wiltshire, 01722 344011 - A very tricky market but there are deals to be done.



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Jeff Cole MRICS, Cole Rayment & White, Wadebridge, Cornwall, 1208813595 - August is always a difficult month due to the number of people on annual holidays but we have had quite a good month in terms of completions & agreed sales considering the general economic uncertainty.

Mark Lewis FRICS, Symnds & Sampson, Sturminster Newton, Dorset, 01258 472244 - London buyers, following the riots, are making more enquiries about buying. Mainly women wanting to move out.

Matthew Harvey BSc MRICS, Tayler & Fletcher, Bourton on the Water, Gloucestershire, 01451 820913 - Lack of supply maintaining sensible prices. Unrealistic guide prices a waste of time. Keen sellers are selling well.

Peter G May FRICS, Minster Property Management Limited, Wimborne, Dorset, 01202 842812 - The summer market is subdued compared with years prior to the recession but market activity has held up at its existing low levels despite the holiday period. This might mean that September and October market is better than expected but in this market events are difficult to predict.

Richard Addington MRICS, Savills, Exeter, Devon, 01392 755745 - Transaction numbers beginning to rise slightly as vendors' expectations are reducing in reaction to world news and the approach of winter.

Robert Williams MRICS, Robert Williams, Exeter, Devon, 01392 204800 - Looking forward to the end of the summer holidays.

Robin Thomas FRICS, Strutt & Parker, Exeter, Devon, 01392 229400 - We have had our busiest August for four years and have been able to agree sales where vendors have been realistic on price. In 2009 and 2010 the autumn market has been the busiest time of the year for agreeing sales. Time will tell if the autumn of 2011 repeats this pattern.

Roger Punch FRICS, Stags, Plymouth, Devon, 01752 223933 - A quiet month in relation to new enquiries, but a reasonable sales level, is what is normal in the holiday period of August. On balance we expect an active September and a positive sales level as vendors increasing agree to realistic price levels and purchasers see this as a good time to buy.

Stephen Morris MRICS IRRV, Davies & Way, Keynsham, Bristol, 01225 400400 - Stable market generally. August was busy compared to normal.

## Wales

Andrew Morgan FRICS, Morgan & Davies, Lampeter, Ceredigion, 01570 423623 - A very over-supplied market place in virtually all categories. Buyer confidence remains low.

D E Hall FRICS, David Baker & Company, Penarth, Vale of Glamorgan, 029 2070 2622 - Prices holding their own, other than flats. Activity picked up a little through August which is normally quiet. Difficult 6 months coming up. Vendors becoming frustrated if they have not sold and changing agents.

David Jones FRICS, Jones & Redfearn, Rhyl, Denbighshire, 01745 351111 - The market continues to splutter back into life. Instructions are holding up but sales have to be ground out. Keeping sales going is not being helped by Valuers adopting 'The Caution Method' of valuation. Unwarranted down valuation is becoming a problem and needs addressing.

David W Pearce FRICS, David W Pearce & Co., Mold, Flintshire, 01352 700274 - Although transaction levels remain modest, some increase in activity being noticed. First time buyer market still subdued however.

Delyth Davies, Clee Tomkinson Francis, Swansea, Wales - Lack of finance.

Delyth Davies MRICS, Clee Tomkinson Francis, Carmarthen, Carmarthenshire, 1267230645 - The market for larger detached houses, set within a good size plot, in town has recently been proven with one property receiving multiple offers in excess of the asking price, within a very short marketing period. A positive result.

John Nicholas MRICS, J J Morris, Haverfordwest, Pembrokeshire, 01437 760440 - Realistically priced properties continue to meet a reasonable demand and are selling. Still a large number of properties being marketed at 2007/8 prices despite the fact that the market has adjusted which does not help the market.

Kelvin Francis FRICS, Kelvin Francis & Co., Cardiff, South Glamorgan, 029 2076 6538 - There is an increase in the number of valuations and instructions received, as well as a higher level of viewing activity, many of whom are in a position to proceed. The choice of property is wide, but buyers are taking their time in deciding. The indicators from both vendors and viewers are ones of growing confidence, albeit at a flat level of prices.

Paul Lucas FRICS, RK Lucas & Son, Haverfordwest, Pembrokeshire, 01437 762538 - Market activity has slowed down significantly in the last month.

Robert Wilkins MRICS, Newland Rennie Wilkins, Newport, Wales, 01633 221441 - Those properties being sold are being sold at discounted prices unless you have that old adage of location, location, location in which case prices are holding up.

## London

A Griffith 075454, Robert Sterling Surveyors LLP, Walthamstow, Waltham Forest, 0845 8380930 - Summer holidays have reduced activity.

Anthony Fieldhouse MRICS, Anthony Fieldhouse & Co, Greenford, LB Ealing, 020 8813 0202 - In this outer London borough, the difficulty in obtaining mortgages remains the most significant factor in the housing market.

Benson Beard MRICS, Bective Leslie Marsh, London, London, 020 7589 6677 - August has been quiet, as expected, with both buyers and instructions down on July. What's worrying though is the number of new instructions booked for September. This shortage of property can only mean prices will continue to rise.

Charles Puxley, Jackson-Stops & Staff, Chelsea, London, 020 7581 5881 - Central London is currently suffering from a lack of sellable instructions and this trend shows no sign of changing. So in order to maintain turnover agents set about doing more off market deals where vendors want little fuss. We are noticing more and more people visiting our office for pleasure rather than business who have not the remotest intention of buying any time soon.

James Gubbins MRICS, Dauntons, Pimlico, Westminster, 020 7834 8000 - Although, naturally for this time of the year, buyer enquiries have reduced slightly, the same cannot be said for general interest in properties and the offers continue to be received. Less enquiries producing the same number of offers monthly.

James Perris BSc MRICS, De Villiers Chartered Surveyors, London, Central London, 020 7887 6009 - The market for good quality Central London housing stock remains strong particularly from overseas buyers with agents often receiving competing bids for the limited amount of properties available. Whilst this demand is likely to continue in the short term, we would anticipate an increase in properties coming onto the market after the holiday period.

James Wilson DipSurv MRICS FCIARB, W A Ellis, Knightsbridge & Belgravia, London, 020 7581 7654 - August, as traditionally happens, has seen a reduction both in sales agreed and new instructions however activity has picked up in the last week and we are expecting a good autumn, in spite of reduced stock levels.

Jeremy Leaf BSc FRICS, Jeremy Leaf & Co., Finchley, Barnet, 020 8446 4295 - August proved quieter than usual as far as new listings were concerned but at least abortive transactions were steady - both of which are helping to underpin prices especially for 3 & 4 bed family houses. Obtaining mortgage finance is still proving difficult for which is contributing to slowing transaction pace. However, demand for brand new homes - also in short supply - continued strongly.

John King MRICS, Quinton Scott, Wimbledon, London, 020 8971 6780 - Price reductions are having a positive effect on the market. Agents are still over-valuing in an effort to win instructions. Purchasers are more confident. Overall we are beginning to see a more balanced market where demand is meeting supply.

Justin Knight MRICS, Bective Leslie Marsh, Brook Green, London, 020 7603 5181 - A chronic lack of stock together with the city financial vehicles performing poorly, has led to an imbalance in supply and demand. Competition for flats and houses remains strong with most properties attracting competition bidding. We feel that as the euro gets weaker as well the dollar, sterling and prime UK residential property markets will grow stronger. Locally our W14/W6 market is taking off in late summer on the back of a major growth in Notting Hill and Kensington.

Keith Barnfield FRICS, Barnfields, Enfield, Middlesex, 020 8363 3394 - Activity has been good throughout the summer. Prices remain reasonably stable.

Laura Watkinson MRICS, Knight Frank, London, Westminster - Hyde Park, 020 7861 5521 - Lack of supply in second quarter led to increased prices on a rate per square foot basis, driven by international cash buyers. This increase slowed down gently during the summer holiday and Ramadan but with September approaching there appears to be a flurry of activity on the return.

Luke Pender-Cudlip MRICS, Knight Frank, Wandsworth/Balham/Clapham, London, 020 8682 7777 - Lack of stock is keeping prices stable.

Robert Green MRICS, John D Wood & Co., Battersea, London, 020 7352 1484 - The market continues to be strong in Battersea. This strength is best illustrated by the fact that we had three gazumps on the day of the riots in Battersea. Shortage of stock remains the key problem.

Robert Green MRICS, John D Wood & Co., Belgravia, London, 020 7352 1484 - The summer holidays have caused a marked reduction in enquiries and new stock, which is to be expected. There are still many frustrated buyers registered with us and keen to purchase a house or flat.



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Robert Green MRICS, John D Wood & Co., Chelsea, London, 020 7352 1484 - A continued lack of supply and strong demand has kept prices firm. Overseas buyers prefer property in excellent condition, and in the case of flats held on a long lease or with a share of freehold. August has been quieter than recent months, due to holidays, but we have sold some big houses, and expect the autumn to be a busy time.

Robert Green MRICS, John D Wood & Co., Fulham, London, 020 7352 1484 - Supply continues to be limited and demand remains high, which is supporting price growth. Fulham is benefitting from an influx of overseas cash buyers. Proposed plans to build an entrance to a super sewer have had a negative effect on the immediate area concerned.

Robert Green MRICS, John D Wood & Co., North West London, London, 020 7352 1484 - Continued lack of stock is keeping prices buoyant, with a good proportion of property selling strongly with some competition. At the margin, there is some hesitancy due to economic uncertainty - often encouraging potential vendors to stay put, rather than deterring buyers.

Robert Green MRICS, John D Wood & Co., Kensington, London, 020 7352 1484 - Traditionally August is always quiet and this year has been no exception. Once the summer holidays are over we would expect business as usual in September and doubt that the turbulent city markets will impact on prime London real estate.

Robert Green MRICS, John D Wood & Co., South Kensington, London, 020 7352 1484 - South Kensington is a very international market, which traditionally sees good turnover as overseas owners tend to sell at the end of their time in London. Now, they prefer to keep the property and rent it out as they do not know where else to invest the money. This shortage of stock is keeping prices up.

Simon Aldous BSc MRICS, Savills Commercial Ltd., London, London, 020 7016 3861 - Quality houses in prime central London are holding up and demand still strong.

Stephen Whitley FRICS, R Whitley & Co., West Drayton, Middlesex, 01895 442711 - August has been a very busy month with an unexpected high volume of sales.

#### Scotland

Alasdair Seaton BSc MRICS, D M Hall, Dunfermline and Environs / Kinross, Scotland, 01383 621262 - Generally flat market. Sales at around Home Report value.

Alexander Inglis BA MRICS, C/KD Galbraith, Scottish Borders, Scotland, 01573 224244 - Continued lack of confidence in the economy means that there are not enough buyers available for the property currently on the market. However, attractive and properly priced properties are continuing to attract interest. Viewings have been healthy but it is hard to translate these into sales.

Andrew MacFarlane BSc MRICS, Graham + Sibbald, Hamilton, Lanarkshire, 01698 422500 - Market conditions have been somewhat subdued. The property market requires a consistent flow of first time buyers to allow people to move up the property ladder. As a consequence of the limited availability and high costs of mortgage finance, many prospective first time buyers are being driven to an ever more competitive rental market. As demand for rented accommodation increases so does the rents commanded in popular locations which are subsequently curtailing the ability for those prospective buyers to raise an adequate deposit. Shared equity schemes and the occasional 95% mortgage facility will assist but it will be some time yet before we return to 'normal' market conditions.

Brian Devine FRICS, Graham+Sibbald, Stirling, Stirlingshire, 01786-463111 - There have been no significant changes to the market during August. Good number of Home Report refreshes being requested indicative that sales are concluding albeit not at a level that would suggest the market is recovering to normality.

Chris Hall MRICS, Rettie and Co, Edinburgh, Scotland, 0131 220 4160 - Market generally remains challenging out of the better districts of Edinburgh and Glasgow with imbalance between supply and demand.

Chris Highton, Allied Surveyors Scotland plc, Selkirk, Scottish Borders, 01750 724170 - The usual upturn after the summer holidays has appeared again. August has seen an increase in activity and prices remain steady, especially for the good stock. We've even seen a few closing dates. Some more activity at the lower end, although it is noted that some of this activity is back to buy to let investors. Still, as lower end stock sells it should get the rest of the market moving again. Cautious still.

Darroch Robertson MRICS, Graham + Sibbald, Aberdeen, Aberdeen/Aberdeenshire, 01224 625024 - As expected the market had become somewhat subdued during the summer holiday period however activity has definitely increased towards the end of August. Transcription requests continue to be received within three months of property going on market indicating properties continue to sell within this period however there is no apparent consistency. New build sales appear relatively strong, particularly for sites offering smaller more affordable properties, especially where incentives are offered.

Gordon Macdonald FRICS, Allied Surveyors Scotland, Aberdeen, Aberdeenshire, 1224571163 - A quiet period over the summer has been followed by a return to previous levels of activity, not busy, but buoyant by comparison with most areas. Sales are continuing where realistic pricing and expectation of sellers is maintained but anything overpriced or in poor condition still proves difficult to sell. Top end properties are selling well, with off-market deals increasing in popularity. Properties remote from Aberdeen only selling slowly and often at reduced prices, reflecting over supply.

Grant Robertson MRICS, Allied Surveyors, Glasgow, Scotland, 0141 330 9950 - With any immediate threat of a rise in interest rates receding and consequently more attractive mortgage products coming through we expect a relatively stable autumn market with steady values across most sectors. Listings from earlier in the year need tweaking to stay in line with current agent/surveyor pricing to ensure interest from purchasers.

Ian Morton BSc(Hons) MLE MRICS, Bradburne & Co., St Andrews, Scotland, 01334 479 479 - Traditionally market picks up after summer school holidays, but this year it is slow to recover. Only time will tell if autumn market picks up to last years level.

Kevin MacDonald MRICS, Graham + Sibbald, Inverness, Inverness-Shire, 01463 236977 - Following a slow summer period the market appears to be gaining a degree of momentum once more with a number of properties going under offer since the schools have returned from the summer break. The considerable number of properties still available is still perceived as a deterrent for those considering bringing their house to the market and those which are selling are generally realising prices below asking price and valuation. The ability to satisfy lending criteria continues to stifle activity.

Malcolm Taylor FRICS, Bell Ingram Ltd., Forfar, Angus, 01307 462516 - Obvious slowing possibly due to holidays but autumn period looking weak.

Richard A Clowes MRICS, DM Hall LLP, Galashiels, Scottish Borders, 01896 752009 - An increase in the numbers of refresh home reports and transcriptions suggests that there are a few more buyers out there. Coming out of the holiday period there are signs of more properties coming onto the market once again.

Stephen Johnston BSc FRICS, David Adamson & Partners Ltd., Lerwick, Shetland, 01595 696788 - Prospective buyers still cautious but local economy reasonably stable and realistically priced properties selling fairly readily.

#### Northern Ireland

Aidan Conway MRICS, P Andrews Chartered Surveyors, Londonderry, County Londonderry, 2871263635 - There has been some increase in sales as first time buyers are attracted by the current low sales prices but mortgage availability is still difficult.

Bronagh Boyd MRICS, Digney Boyd Ltd., Newry, Co Down, 028 30 833 233 - The number of reposessions are continuing to grow in the current market. Tough criteria still exists for mortgage applicants.

Harold Montgomery FRICS, Montgomery Finlay & Co., Enniskillen, Co. Fermanagh, 028 6632 4485 - Still very little volume. Main sales up to £120,000.

J G Fleming MRICS, J G Fleming, Omagh, Co Tyrone, 028 8225 0040 - Growing number of reposessions. This is providing more choice - sometimes at lower prices etc.

Tom McClelland FRICS, McClelland Salter, Lisburn, Co Antrim, 028 92674121 - With sellers more realistic about asking prices the number of summer transactions have increased compared to last year.



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## Contributor details

## North

Andrew Bruce Dip VEM FRICS, Edwin Thompson, Berwick-on-Tweed, Northumberland - 01289 304432

Dan Maddison MRICS, Foster Maddison Property Consultants, Hexham, Northumberland - 01434607711

Ed Alder BSc(Hons) MRICS, Gleeson Developments Ltd, Sunderland, Tyne & Wear - 0191 5370070

Keith Johnson FRICS, J W Wood, Durham, Durham - 1913869921

Mr T H Brannen FRICS, Brannen and Partners, Whitley Bay, Tyne and Wear - 0191 2517878

Neil Foster BSc Hons MRICS, Foster Maddison Property Consultants, Newcastle Upon Tyne, Tyne & Wear - 01434607711

P Airey MRICS, Paul Airey Chartered Surveyors, Sunderland, Tyne & Wear - 0191 514 5777

Peter M Hayward FRICS, Hayward Tod Associates .co.uk, Carlisle, Cumbria - 01228 810300

Roger Windass FRICS, Rickard Chartered Surveyors, Whitley Bay, Tyne & Wear - 0191 252 2920

Sam Gibson, Strutt & Parker, Morpeth, Northumberland - 01670 516123

Simon Bainbridge MRICS, Smiths Gore, Darlington, County Durham - 01325 370500

Stuart T Allan FRICS, Broadley & Coulson, Bishop Auckland, Co. Durham - 01388 602656

## Yorkshire &amp; Humberside

Alex McNeil MRICS, Bramleys, Calderdale/Huddersfield, Halifax - 01484 530361

Ben Hudson MRICS, Hudson Moody, York, North Yorkshire - 01904 650650

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

D Blagden FRICS, e.surv, Harrogate, North Yorkshire - 01423 530001

David Copley BSc MRICS, Beadnall Copley, Harrogate, Yorkshire - 01423 503500

David Pank FRICS, Manning Stainton, Leeds, Yorkshire - 01172 555438

Edward Gordon Astin FRICS, Edward G Astin & Associates Ltd, Whitby, North Yorkshire - 01947 821122

Edward Green MRICS, Jackson Green & Preston, Grimsby, North East Lincolnshire - 01472 311 113

Edward Waterson BSc FRICS, Carter Jonas, York, North Yorkshire - 01904 558201

Francis Brown FRICS, Norman F Brown, Richmond, North Yorkshire - 01748 822473

Ian Adams MRICS MEWI RICS Registered Valuer, Consultant Stanifords & Miller Metcalfe Ltd, Hull, East Riding of Yorkshire - 7703329933

Ian Bebbington BSc MRICS, Ian Bebbington Estate Agents, Northallerton, Yorkshire - 01609 760333

Ian Briggs FRICS, Dacre, Son & Hartley, Ilkley, West Yorkshire - 01943 600655

J W G Cameron FRICS, Stanton Mortimer Limited, Northallerton, North Yorkshire - 01609 773004

John E Haigh BSc MRICS FAAV, Lister Haigh, Knaresborough, North Yorkshire - 01423 860 322

John Francis FRICS, Crapper & Haigh, Sheffield, South Yorkshire - 0114 272 9944

Kenneth Bird MRICS, Renton & Parr, Wetherby, West Yorkshire - 01937 582731

M J Hunter MRICS, Grice and Hunter, Doncaster, South Yorkshire - 01302360141

Michael Beech MRICS, Windle Beech Winthrop, Skipton, North Yorkshire - 01756 692900

Michael Stephenson MRICS, Joplings Estate Agents, Thirsk, Yorkshire - 07540 691652

Nick Talbot, Carter Jonas, Harrogate, Yorkshire - 01423 707803

Peter M Mawer FRICS, Cranswicks, Bridlington, E Yorkshire - 01262 672110

Richard J Graves FRICS, D. Dunk, Lewis & Graves, Bridlington, East Yorkshire - 01262 672576

Stephen Edwards FRICS, Cundalls, Malton, North Yorkshire - 01653 697820

Tim Brown MRICS, George F White LLP, Bedale, North Yorkshire - 01677 425301

Toby Milbank MRICS, Strutt & Parker, Harrogate, North Yorkshire - 01423 561274

## North West

Andrew Holmes BSc (Hons) Dip Surv MRICS, Carter Jonas, South Lakeland, Cumbria - 01539 814908

Brian Boys MRICS, B & E Boys Ltd., Rossendale, Lancashire - 01706 211 368

Brian Jackson FRICS, Ellis & Sons, Southport, Merseyside - 01704 534171

Chris Cockwill BSc (Hons) MRICS, Cockwill & Co., Ormskirk / Southport, Merseyside - 01704 827075

Derek Coates MRICS, Venmore, Liverpool, Merseyside - 0151 236 0301

John Halman FRICS, Gascoigne Halman, Wilmslow, Cheshire - 1625460344

John Robinson FRICS FAAV, Whittaker & Biggs, Congleton, Cheshire - 01260 274224

Jonathan Clayton FRICS BSc, Bentley Higgs & Co., Blackpool, Lancashire - 01253 302928

M G Fell BSc FRICS, t h Woodhouse & Co., Birkenhead, Merseyside - 0151 608 9776

Michael Fisher FRICS, Fisher Wrathall, Lancaster, Lancashire - 152468822

Nicholas Marsh FRICS, Frank R Marshall & Co., Northwich, Cheshire - 01606 41318

R C Powell FRICS, Ryder & Dutton, Oldham, Lancashire - 0161 925 3232

Terence Redding MRICS, Warrington Borough Council, Warrington, Cheshire - 01925 442848

William Legget FRICS, Denton Clark & Co., Chester, Cheshire - 01244 409660

## East Anglia

A C Farnsworth MRICS, Berrys, Kettering, Northamptonshire - 1536532373

Ben MacIntyre MRICS, Macintyres Ltd, Brackley, Northants - 01280 701001

Charles Ball MRICS, Bury & Hilton, Ashbourne/ Buxton, Derbyshire - 01538 383344

Charles Ball MRICS, Bury & Hilton, Ashbourne, Derbyshire - 01538 383344

Christopher Bletsoe FRICS FAAV, Bletsoe Estate Agents, Thrapstone, Kettering - 01832 732188

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

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

David Johnson Dip Arb FRICS MCI Arb, Readings Property Group Ltd, Leicester, Leicestershire - 0116 204 6157

Douglas Gascoigne MRICS, Gascoignes, Southwell, Nottinghamshire - 01636 813245

Edward Wreglesworth FRICS, Escritt Barrell Golding, Sleaford, Lincolnshire - 01529 302271

Graham Freckelton FRICS, Freckeltons, Loughborough, Leicestershire - 01509 214564

Ian J Shaw FRICS, Escritt Barrell Golding, Grantham, Lincs - 1476590211

Kate Grace, Savills, Nottingham, Notts - 0115 9348036

Mark Newton FRICS, Newton Fallowell, Grantham, Lincolnshire - 1476584185

Martin Pendered FRICS, Martin Pendered & Co., Wellingborough, Northamptonshire - 01933 228822

Neil Hunt FRICS, Wilkins Vardy Residential Limited, Chesterfield, Derbyshire - 01246 270123

Peter Mountain FRICS, Peter Mountain, Louth, Lincolnshire - 01507 603 366

Philip Barnatt MRICS, Mundy & Co., Lincoln, Lincolnshire - 01522 510044

R L Bell BSc FRICS, Robert Bell & Company, Horncastle, Lincs - 01507 522222

S B Saunders FRICS, Stephen Saunders, West Bridgford, Nottingham - 0115 923 4482

Stephen Gadsby BSc FRICS, Gadsby Orridge, Derby, Derbyshire - 01332 296396

Stephen J King FRICS, King West, Market Harborough, Leicestershire - 01858 435970

William Downing BSc (Hons) MRICS, Pygott and Crone, Lincoln, Lincs - 01522 526777

## East Midlands

A Champion FRICS, Halls, Worcester, Worcestershire - 01905 611066

Adrian Powell FRICS, A Victor Powell, Bromsgrove, Worcestershire - 01527 832 222

Andrew Grant FRICS, Andrew Grant LLP, Worcester, Worcestershire - 07976-982742

Andrew Oulsnam MRICS, Robert Oulsnam & Co., Barnt Green, Birmingham - 0121 445 3311

Andrew Perrin MRICS, Fraser Wood Mayo & Pinson, Walsall, West Midlands - 01922 627686

Brian Holt MA MRICS, Brian Holt Chartered Surveyors, Leamington Spa, Warwickshire - 01926 450999

Brian Holt MRICS, Brian Holt, Coventry, West Midlands - 02476 712777

Charles Ball MRICS, Bury & Hilton, Leek, Staffs - 01538 383344

Jeffrey Gregson FRICS, GregsonPage, Worcester, Worcestershire - 01905 852 007

Jeremy Dell MRICS FAAV, J J Dell & Company, Oswestry, Shropshire - 01691 653437

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

John Ozwell FRICS, Hunters, Solihull, West Midlands - 01564 771000



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Julian T J Owens, Arkwright Owens, Hereford, Herefordshire - 01432 267213

N S Robbins MRICS, Knight Frank LLP, Birmingham, West Midlands - 0121 200 2220

Nicola Farmer Student Member, John Earle, Henley in Arden, Warwickshire - 1564794343

Ryan Williams BSc FRICS, McCartneys LLP, Hay-on-Wye, Hereford - 01497 820778

T. Wyn Jones FRICS, McCartneys LLP, Ludlow, Shropshire - 01584 872153

Tim Pook MRICS, Cooper Green, Shrewsbury, Shropshire - 01743 276666

#### West Midlands

Andrew Wagstaff MRICS, Bedfords, Burnham Market, Norfolk - 01328 730 500

Charlie Penrose MRICS, Arnolds Property Consultants LLP, Norwich, Norfolk - 01603 620551

Christopher Philpot BSc FRICS, Lacy Scott & Knight, Stowmarket, Suffolk - 01449 612384

David Burr MRICS, David Burr (Long Melford) Ltd., Long Melford, Suffolk - 01787 883144

Graham Bunnnett FRICS, Carter Jonas, Peterborough, Cambridgeshire - 01733 588602

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

John B Shrive FRICS, John B Shrive, Holt, Norfolk - 01263 713303

John Pocock, Pocock & Shaw, Cambridge, Cambridgeshire - 01223 322552

Nicholas Rudge FRICS, FAHV, Durrants, Beccles, Suffolk - 01502 712122

Residential Sales (Neil), Connells Estate Agents, Ipswich, Suffolk - 01473 219514

Richard Bannister FRICS, Bannister & Company, Felixstowe, Suffolk - 01394 282828

Robert Swiney MRICS, Strutt and Parker, Ipswich, Suffolk - 01473 220428

Simon Hickling MRICS, FAHV, Maxey & Son, Wisbech, Norfolk - 01945 583123

Stuart Clarke MRICS, Clarke & Simpson, Framlingham, Suffolk - 01728 724 200

Tom Goodley MRICS, Strutt & Parker, Norwich, Norfolk - 1603617431

#### South East

Andrew Miller FRICS, Linay & Shipp, Orpington, Kent - 01689 825678

Anthony Jamieson MRICS, Clarke Gammon Wellers, Godalming, Surrey - 01483 417131

Anthony Jamieson MRICS, Clarke Gammon Wellers, Guildford, Surrey - 01483 880900

Bryan Elphick FRICS, Elphick Estate Agents, Ashtead, Surrey - 01372 272321

Clive Rutland FRICS, Rutland Chartered Surveyors, Southampton, Hampshire - 023 8066 3451

David Boyden BSc MRICS, Boydens, Braintree/ Colchester, Essex - 01206 762244

David Nesbit FRICS, D.M.Nesbit & Company, Portsmouth, Hampshire - 023 9286 4321

David Oswick FRICS, David Oswick FRICS, Halstead Essex, Essex - 1787477559

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

David Sherwood MRICS, Fenn Wright, Colchester, Essex - 01206 216556

David Smith BSc MRICS, Carter Jonas, Andover, Hampshire - 01264 342342

Edward Robinson MRICS, Robinson, Maidenhead, Berkshire - 01628 637600

Geoffrey Chapman MRICS, Barker Associates, Essex, Essex - 01279 647111

Geoffrey Chapman MRICS, Barker Associates, Bishop's Stortford, Hertfordshire - 01279 647111

Geoffrey Holden FRICS, Parsons Son & Basley, Brighton, East Sussex - 01273 274011

Ian Perry FRICS, Perry Bishop & Chambers, Faringdon, Oxon - 01285 655355

John Frost MRICS, The Frost Partnership, Amersham/ Ashford/ Beaconsfield/ Burnham/ Gerrards Cross/ Staines/ Slough/ Windsor, Middlesex - 01494 680909

John King MRICS, Quinton Scott, Merton, Surrey - 020 8971 6780

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

Kevin Rolfe MRICS, Aitchison Raffety, Berkhamstead/ Hemel Hempstead/ St Albans, Herts - 1442875509

Mark Everett BSc FRICS, Michael Everett & Co., Epsom, Surrey - 01372 273448

Martin Allen MRICS, Elgars, Wingham, Canterbury, Kent - 01227 720557

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

Peter Fearn FRICS, Keats Fearn, Farnham, Surrey - 1252718018

Peter Mockett FRICS, Hilbery Chaplin, Romford, Essex - 01708 732732

Peter T Foster FRICS, Porter Glenn, Grays, Essex - 01375 374 444

Philip Hiatt MRICS, Your Move Philip Hiatt, East Grinstead, W Sussex - 01342 321142

R A Sumner BSc FRICS, Sumner Pridham, Tunbridge Wells, Kent - 01892 516615

Richard Athow FRICS, Philip A Chapman, Hythe, Kent - 1303264846

Richard Meeson MRICS, Carter Jonas, Winchester, Hampshire - 01962 842742

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

Rozanne Edwards, Strutt and Parker, St Albans, Hertfordshire - 1727840285

William Leschallas MRICS, Jackson-Stops & Staff, Burford, Oxfordshire - 01993 822661

#### South West

Ben Marshall MSc MRICS, Woolley & Wallis, Shaftesbury, Dorset - 01747 852242

D G Maskell MRICS, FAHV, Jefferys, Liskeard/ Wadebridge, Cornwall - 01208 872245

David Dark FRICS, FNAEA, Seldon Ward & Nuttall, Bideford, Devon - 01237 477997

David Mackenzie, Carter Jonas, Bath, Somerset - 01225 750900

David McKillop BSc FRICS, McKillop & Gregory, Salisbury, Wiltshire - 01722 414747

Gary A Lawrence BSc Hons MRICS, Charles Lear & Company, Cheltenham, Gloucestershire - 01242 222 722

Graham Thorne FRICS, FCIQB, Thorne Chartered Surveyors, Poole, Dorset - 01202 684004

Ian Perry FRICS, Perry Bishop & Chambers, Cheltenham/ Cirencester/ Fairford/ Malmesbury/ Nailsworth/ Tetbury, Gloucestershire - 01285 655355

J G Waterton MRICS, Strutt & Parker, Salisbury, Wiltshire - 01722 344011

Jeff Cole MRICS, Cole Rayment & White, Wadebridge, Cornwall - 1208813595

Mark Lewis FRICS, Symnds & Sampson, Sturminster Newton, Dorset - 01258 472244

Matthew Harvey BSc MRICS, Tayler & Fletcher, Bourton on the Water, Gloucestershire - 01451 820913

Matthew Higgs FRICS, Michelmores Hughes, Totnes, Devon - 01803 862 002

Michael Joyce MRICS, Cooper & Tanner, Frome, Somerset - 01373 455060

Gilyard Scarth, Shaftesbury, Dorset - 01747 851122

OF Miles FRICS, Oliver Miles, Swanage, Dorset - 01929 426655

Peter G May FRICS, Minster Property Management Limited, Wimborne, Dorset - 01202 842812

Philip Muzzlewhite FRICS, Whitton & Laing, Exeter, Devon - 01392 259395

Richard Addington MRICS, Savills, Exeter, Devon - 01392 755745

Robert House FRICS, Kavanaghs, Melksham, Wiltshire - 01225 706860

Robert Williams MRICS, Robert Williams, Exeter, Devon - 01392 204800

Robin Thomas FRICS, Strutt & Parker, Exeter, Devon - 01392 229400

Roger Punch FRICS, Stags, Plymouth, Devon - 01752 223933

Stephen Froy BSc MRICS, Elder & Froy, Beaminster, Dorset - 01308 862606

Stephen Morris MRICS, IRRV, Davies & Way, Keynsham, Bristol - 01225 400400

#### Wales

Andrew Morgan FRICS, Morgan & Davies, Lampeter, Ceredigion - 01570 423623

Andrew Turner MRICS, Morris Marshall & Poole MRICS, Powys, Wales - 01686 626 160

D E Hall FRICS, David Baker & Company, Penarth, Vale of Glamorgan - 029 2070 2622

Dafydd Hardy MRICS, Dafydd Hardy Y Gwerthwyr Tai, Llangefni, Ynys Mon - 01248 723322

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

David James FRICS, James Dean, Brecon, Powys - 01874 624757

David Jones FRICS, Jones & Redfearn, Rhyl, Denbighshire - 01745 351111

David Martin FRICS, Newland Rennie Wilkins, Cwmbran, Torfaen - 01633 868341

David W Pearce FRICS, David W Pearce & Co., Mold, Flintshire - 01352 700274

Delyth Davies, Clee Tomkinson Francis, Carmarthenshire/ Swansea, Wales - 01267230645

Giles Birt BSc MRICS, Birt & Company, Tenby, Pembrokeshire - 01834 842204

John Nicholas MRICS, J J Morris, Haverfordwest, Pembrokeshire - 01437 760440

Kelvin Francis FRICS, Kelvin Francis & Co., Cardiff, South Glamorgan - 029 2076 6538

Michael Lawley, Cooke and Arkwright, Cardiff, Cardiff - 02920 346346

Paul Lucas FRICS, RK Lucas & Son, Haverfordwest, Pembrokeshire - 01437 762538



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Robert Wilkins MRICS,  
Newland Rennie Wilkins,  
Newport, Wales - 01633  
221441

#### London

A Griffith 075454, Robert  
Sterling Surveyors LLP,  
Walthamstow, Waltham  
Forest - 0845 8380930

Alastair Iles MRICS, SW1  
Estates Limited t/a Iles &  
Co., Knightsbridge, Lon-  
don - 020 7235 4555

Anthony Fieldhouse  
MRICS, Anthony Field-  
house & Co, Greenford,  
LB Ealing - 020 8813  
0202

Benson Beard MRICS,  
Bective Leslie Marsh,  
London, London - 020  
7589 6677

Brendon Thomas MRICS,  
MAP Chartered Survey-  
ors Ltd, City/ Tower Ham-  
lets/ Hackney/ Newham/  
Southwark, London -  
08456344187

Chariton Symeou, Hanley  
Estates, London, London  
- 020 7561 5502

Charles Puxley, Jackson-  
Stops & Staff, Chelsea,  
London - 020 7581 5881

Henry Faun - RICS  
Trainee Member, Knight  
Frank, London, West End  
- 2076476614

James Gubbins MRICS,  
Dauntons, Pimlico, West-  
minster - 020 7834 8000

James Perris BSc  
MRICS, De Villiers Char-  
tered Surveyors, London,  
Central London - 020  
7887 6009

James Wilson DipSurv  
MRICS FCI Arb, W A  
Ellis, Knightsbridge &  
Belgravia, London - 020  
7581 7654

Jeremy Leaf BSc FRICS,  
Jeremy Leaf & Co.,  
Finchley, Barnet - 020  
8446 4295

John King MRICS, Quin-  
ton Scott, Wimbledon,  
London - 020 8971 6780

Jonathan Slater LLB  
(Hons) MA MRICS, Fos-  
ter Slater, Central/  
Greater London, London  
- 020 8341 4146

Justin Knight MRICS,  
Bective Leslie Marsh,  
Brook Green, London -  
020 7603 5181

Keith Barnfield FRICS,  
Barnfields, Enfield, Mid-  
dlesex - 020 8363 3394

Laura Watkinson MRICS,  
Knight Frank, London,  
Westminster - Hyde Park  
- 020 7861 5521

Luke Pender-Cudlip  
MRICS, Knight Frank,  
Wandsworth/Balham/  
Clapham, London - 020  
8682 7777

Michael Pollard FRICS,  
Pollards, Bexley, Kent -  
01322 559990

Robert Green MRICS,  
John D Wood & Co.,  
Battersea/ Belgravia/  
Chelsea/ Fulham/ Ken-  
sington/ North West/  
Wimbledon/ Wandsworth,  
London - 020 7352 1484

Simon Aldous BSc  
MRICS, Savills Commer-  
cial Ltd., London, London  
- 020 7016 3861

Stephen Whitley FRICS,  
R Whitley & Co., West  
Drayton, Middlesex -  
01895 442711

Tony How FRICS, David  
Brown, London West  
End, London - 020 7637  
1066

#### Scotland

Alasdair Seaton BSc  
MRICS, D M Hall, Kin-  
ross, Scotland - 01383  
621262

Alasdair Seaton BSc  
MRICS, D M Hall, Dun-  
fermline and Environs,  
Scotland - 01383 621262

Alexander Inglis BA  
MRICS, C/KD Galbraith,  
Scottish Borders, Scot-  
land - 01573 224244

Allan Cameron BSc  
FRICS, e.surv, Scotland,  
Scotland - 07968 932030

Andrew MacFarlane BSc  
MRICS, Graham + Sib-  
bald, HAMILTON, Lan-  
arkshire - 01698 422500

Brian Devine FRICS,  
Graham+Sibbald, Stirling,  
Stirlingshire - 01786-  
463111

Chris Hall MRICS, Rettie  
and Co, Edinburgh, Scot-  
land - 0131 220 4160

Chris Highton, Allied  
Surveyors Scotland plc,  
Selkirk, Scottish Borders  
- 01750 724170

Darroch Robertson  
MRICS, Graham + Sib-  
bald, Aberdeen, Aber-  
deen/Aberdeenshire -  
01224 625024

Gordon Macdonald  
FRICS, Allied Surveyors  
Scotland, Aberdeen,  
Aberdeenshire -  
1224571163

Grant Robertson MRICS,  
Allied Surveyors, Glas-  
gow, Scotland - 0141 330  
9950

Ian Morton BSc(Hons)  
MLE MRICS, Bradburne  
& Co., St Andrews, Scot-  
land - 01334 479 479

Kevin I Angus, J & E  
Shepherd, Aberdeen,  
Scotland - 1224202800

Kevin MacDonald  
MRICS, Graham + Sib-  
bald, Inverness, Inver-  
nessshire -  
01463236977

Lindsay S. Duguid, BSc,  
FRICS, McNeill Maguire  
& McCreath, Edinburgh,  
Lothian - 0131 226 6518

Malcolm Taylor FRICS,  
Bell Ingram Ltd., Forfar,  
Angus - 01307 462516

Paul Taylor MRICS, J &  
E Shepherd, Dundee,  
Tayside - 01382 200454

Richard A Clowes  
MRICS, DM Hall LLP,  
Galashiels, Scottish Bor-  
ders - 01896 752009

Stephen Johnston BSc  
FRICS, David Adamson  
& Partners Ltd., Lerwick,  
Shetland - 01595 696788

#### Northern Ireland

Aidan Conway MRICS, P  
Andrews Chartered Sur-  
veyors, Londonderry,  
County Londonderry -  
2871263635

Bronagh Boyd MRICS,  
Digney Boyd Ltd., Newry,  
Co Down - 028 30 833  
233

Daragh Mallon MRICS,  
Best Property Services,  
Newry, County Down -  
2830266811

Harold Montgomery  
FRICS, Montgomery  
Finlay & Co., Enniskillen,  
Co. Fermanagh - 028  
6632 4485

J G Fleming MRICS, J G  
Fleming, Omagh, Co  
Tyrone - 028 8225 0040

N M Maneely FRICS,  
Maneely & Co., Dun-  
gannon, Co Tyrone - 028  
8772 7799

Normal Russell MRICS,  
Russell Brothers, New-  
townards, Co Down - 028  
9181 2145

Samuel Dickey MRICS,  
GOC Estate Agents,  
Belfast, NI - 028 90 662  
366

Tom McClelland FRICS,  
McClelland Salter, Lis-  
burn, Co Antrim - 028  
92674121

William Butcher MRICS,  
Liam Butcher Chartered  
Surveyor, Coleraine /  
Portstewart, Co. Londonderry - 028 70836542

WJ McCann MRICS, Bill  
McCann Estate Agency,  
Lisburn, Antrim - 02892  
666222



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## RICS Contacts

### RICS Housing Market Survey Management

Josh Miller  
Senior Economist  
T: +44 (0)20 7334 3777  
[joshuamiller@rics.org](mailto:joshuamiller@rics.org)

Himanshu Wani  
Economist  
T +44 (0)20 7334 3838  
[hwani@rics.org](mailto:hwani@rics.org)

### Survey subscription information and contributor enquiries

For information on the **Scottish residential property market** contact  
Laura Butcher at RICS in Scotland on 0131 240 0899.

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(0)20 7334 3890.

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**Marianne Chowdhury**  
DD 020 7695 1506  
T 0870 333 1600  
F 020 7695 1501  
[mchowdhury@bcis.co.uk](mailto:mchowdhury@bcis.co.uk)

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The Royal Institution of Chartered Surveyors  
Parliament Square  
London SW1P 3AD

T +44 (0)20 7222 7000  
F +44 (0)20 7334 3795

[economics@rics.org](mailto:economics@rics.org)  
[www.rics.org](http://www.rics.org)



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