

RICS UK Housing Market Survey

July 2011

London continues to outperform rest of UK

- **House prices continue to decline**
- **Price expectations negative albeit less so than previous month**
- **London steams ahead with rising prices**

The July RICS UK Housing Market Survey highlights three key trends. Firstly, prices continue to fall on balance, with more surveyors reporting declines rather than increases. Secondly, activity levels remain pretty flat (and depressed), with new buyer enquiries and new vendor instructions not recording much movement. Lastly, July reinforced the divergence between London and the rest of the country, with house prices continuing to rise in the capital.

The headline house price net balance remained in negative territory, moving from -26 to -22 i.e. 22% more surveyors recorded falling rather than rising prices. That said, of those reporting price falls, 82% did so in the 0 to -2% range.

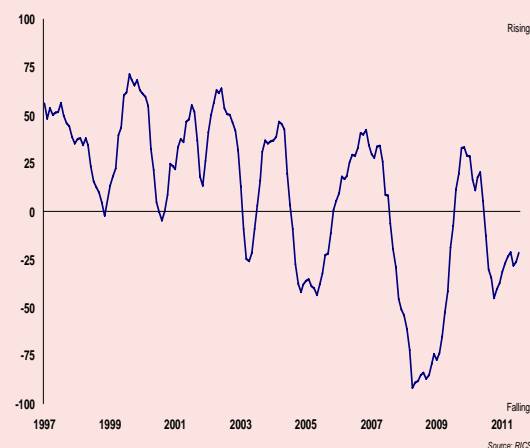
On the demand side, new buyer enquires edged up slightly in July, with the net balance rising from +1 to +5. Meanwhile, new vendor instructions fell slightly, with the net balance falling from 0 to -7.

Turning to activity levels, the average number of sales per surveyor (branch) fell by 3.8% on the month to 14.2. This remains well below the long run average of 26.3. Meanwhile, the average amount of stock on surveyors' books edged up by 0.7% to 70.2. Due to the fact that stocks increased and sales fell, the sales to stock ratio declined to 20.2%. This is well below the long run average of 33.4%, suggesting considerable slack in the market remains.

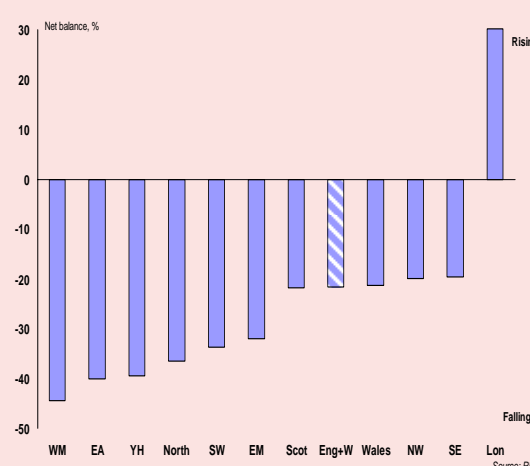
Regionally, the capital continues to stand out from the rest of the country, with the price balance increasing from +21 to +30, the highest reading since May 2010. The West Midlands, East Anglia and Yorkshire & Humberside recorded the most severe price falls. Outside of England and Wales, surveyors in Scotland and Northern Ireland continued to report falling house prices.

Finally, the forward looking components of the survey showed price expectations turned less negative whilst sales expectations remain unchanged, in positive territory.

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**	-----Average per Surveyor-----	sales*
	-----Not Seasonally Adjusted-----				-----Seasonally Adjusted-----		
May-11	10	57	33	-23	-28	72	15
Jun-11	10	58	32	-22	-26	70	15
Jul-11	10	57	32	-22	-22	70	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 = **250 (Covering 405 offices)**



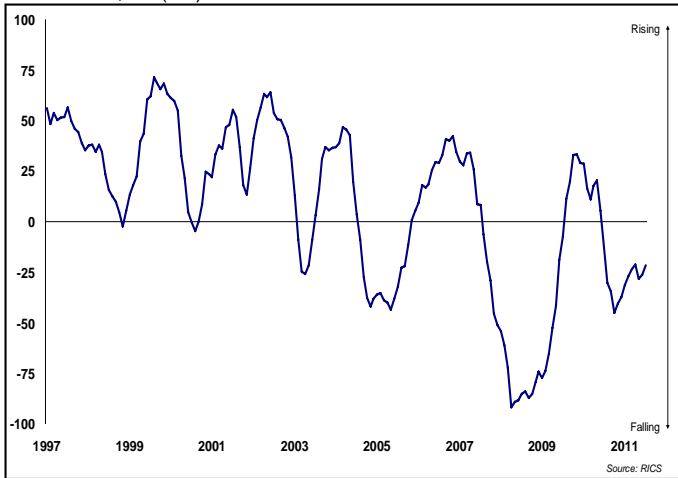
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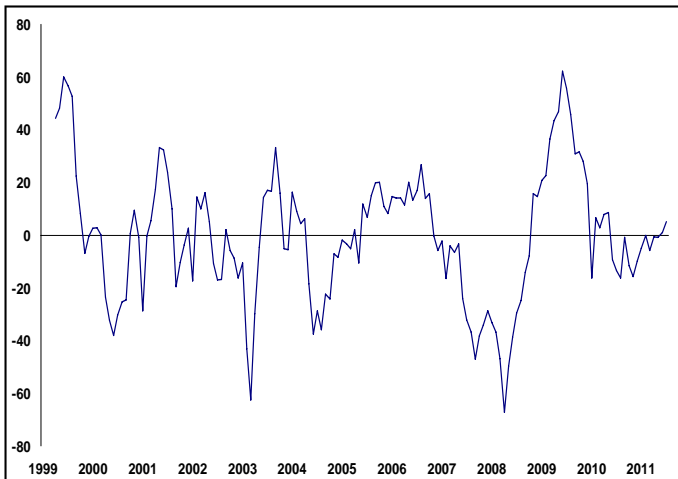
National information

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



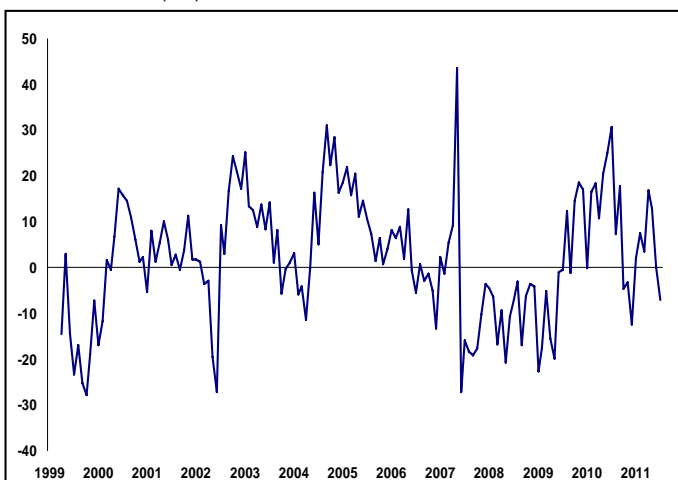
The headline net price balance edged up in July, moving from -26 to -22, but remains in negative territory.

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



The new buyer enquiries net balance increased from +1 to +5.

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



New vendor instructions declined in July, with the net balance decreasing from 0 to -7.



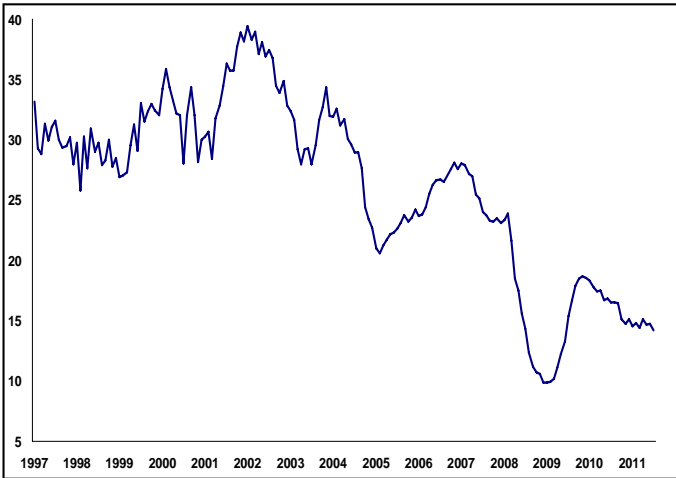
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National information

Property sales in England & Wales, during last three months

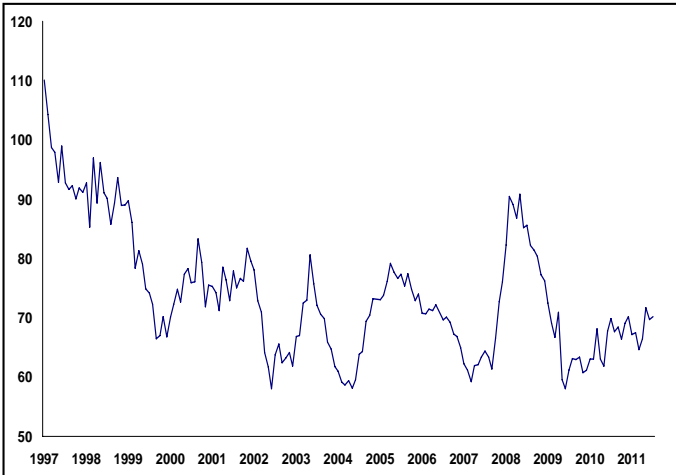
Number, average per surveyor (branch)



The average number of sales per surveyor declined to a 2 year low this month, falling from 14.7 to 14.2.

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

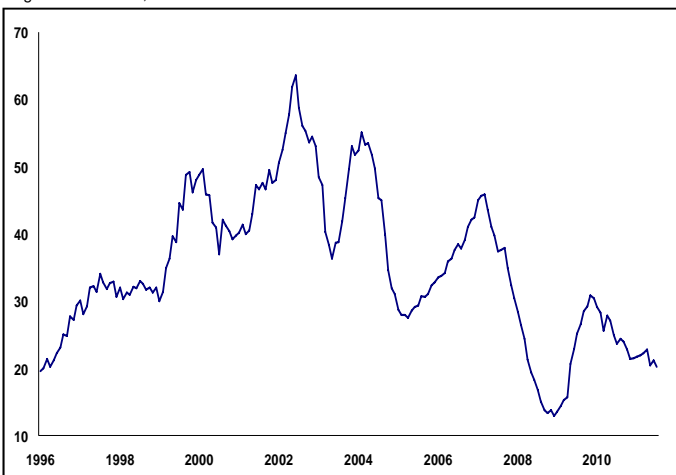
Number, average per surveyor (branch), end period



The average stock on surveyors' books edged up in July, from 69.7 to 70.2.

Ratio of sales to unsold stocks on surveyors' books

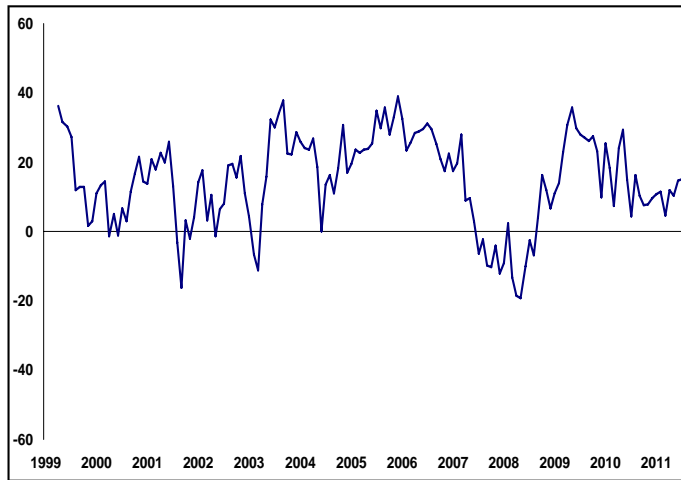
England and Wales, %



The sales to stock ratio declined from 21.2% to 20.2%.

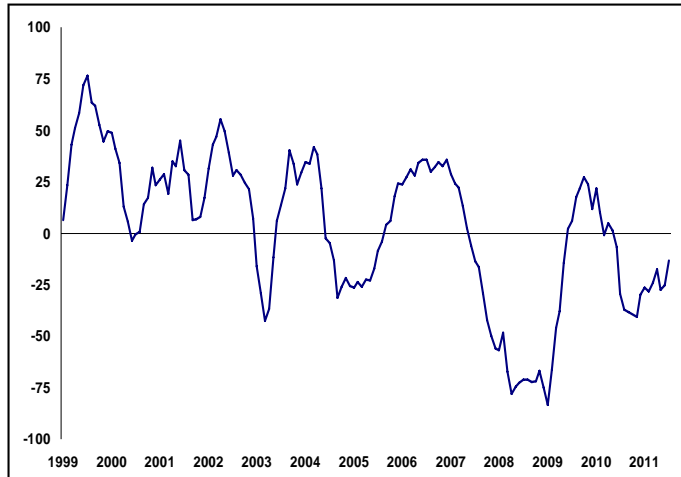
National information

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



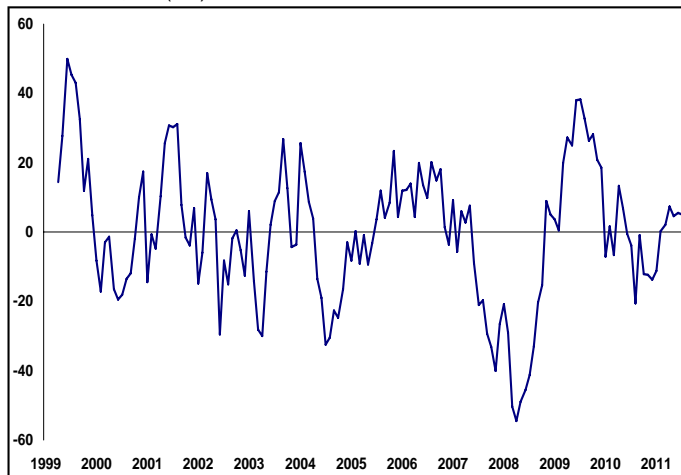
The sales expectations net balance remained unchanged in July, with the net balance at +15.

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



The price expectations net balance increased from -25 to -13, but remains in negative territory.

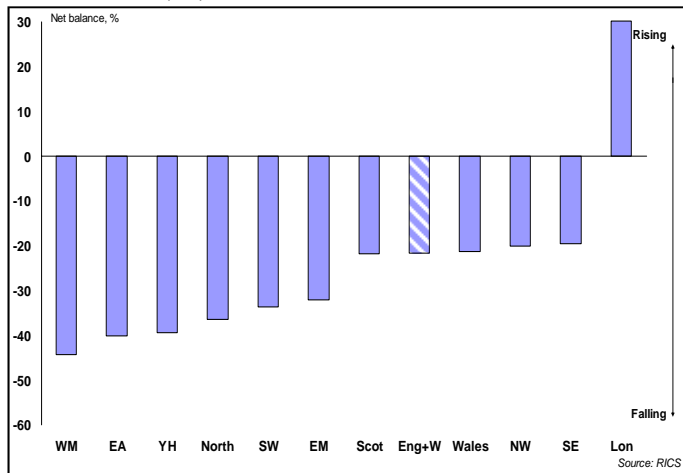
Newly agreed sales - England and Wales - change over past month
Net balance, % (SA)



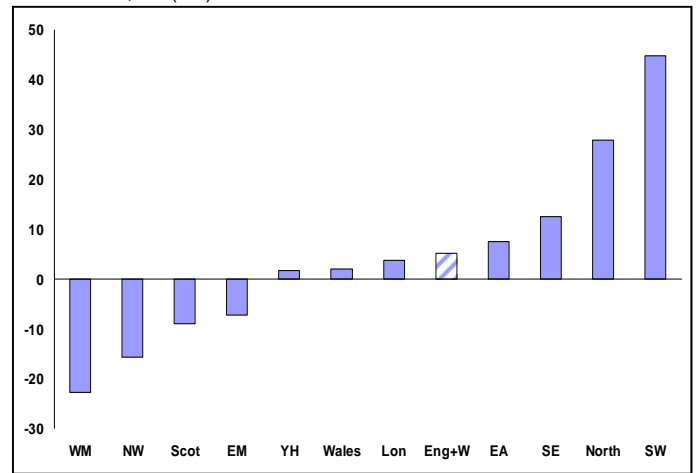
The newly agreed sales net balance remained broadly unchanged this month, moving from +6 to +5.

Regional comparisons for the current month

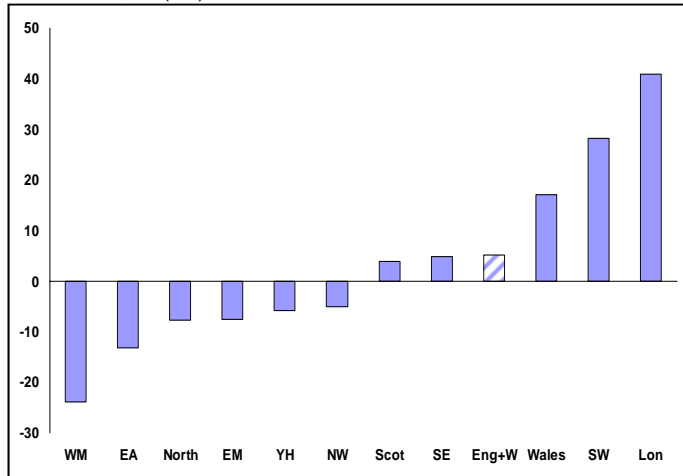
Prices - England and Wales - change over past 3 months
Net balance, % (SA)



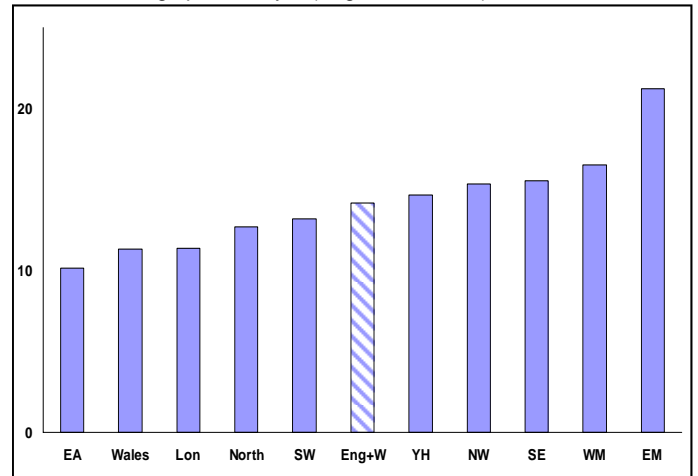
Newly agreed sales - England and Wales - change over past month
Net balance, % (SA)



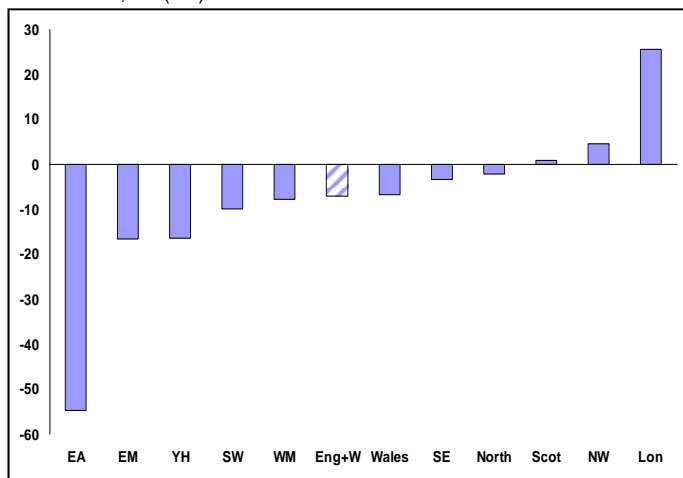
New buyer enquiries- England and Wales - change over past month
Net balance, % (SA)



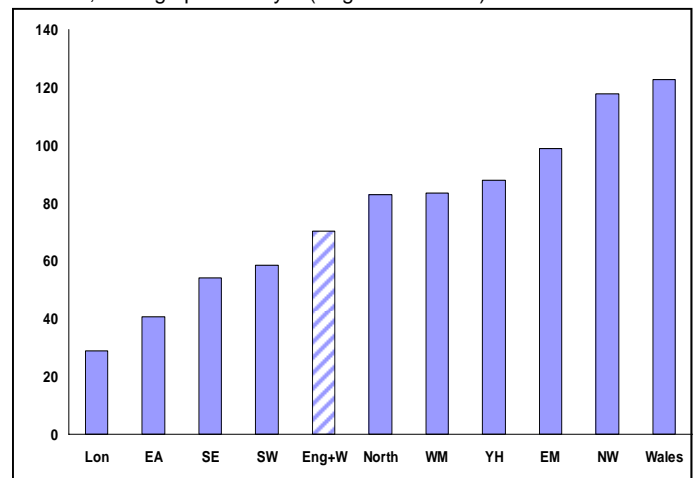
Completed sales per surveyor, over past 3 months
Number, average per surveyor (England & Wales)



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



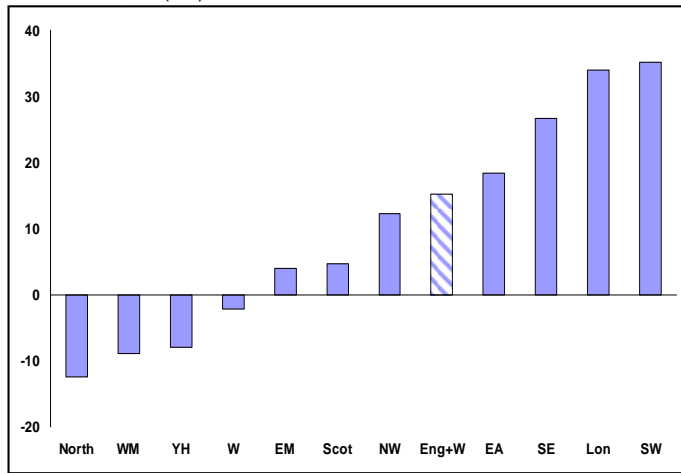
Current inventory of stock on surveyors books
Number, average per surveyor (England & Wales)



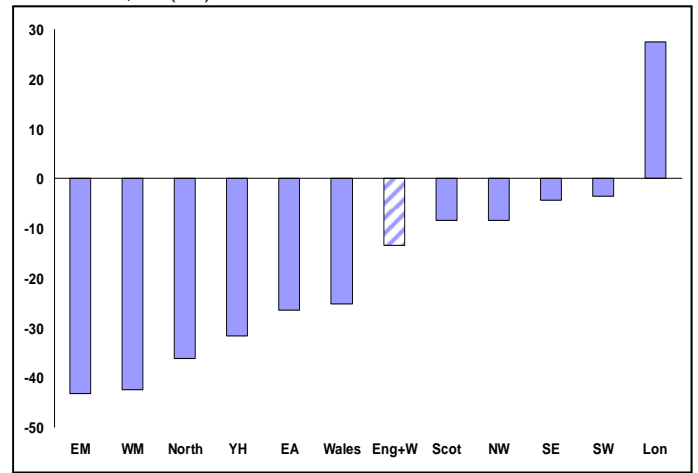
Key: N = North, YH = Yorkshire & Humberside, NW = North West, EM = East Midlands, WM = West Midlands, EA = East Anglia, SE = South East, SW = South West, W = Wales, L = London, Scot = Scotland

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	4	51	42	4	0	0	-42	
Yorkshire & Humberside	0	0	0	2	57	30	6	5	0	-39	
North West	0	0	0	9	64	24	2	0	0	-17	
East Midlands	6	0	0	2	52	33	2	4	0	-32	
West Midlands	0	0	0	1	55	38	4	1	0	-43	
East Anglia	0	0	1	1	55	37	2	3	0	-40	
South East	0	3	0	3	64	24	5	1	0	-25	
South West	0	0	0	5	55	31	8	2	0	-35	
Wales	0	0	0	0	74	23	4	0	0	-26	
London	0	4	8	32	46	5	1	2	1	34	
Scotland	0	0	1	8	65	24	2	0	0	-17	
Northern Ireland	0	0	0	2	48	28	10	6	6	-48	

* 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

Andrew Bell FRICS BSc, North, 07970 842020 - We are only involved in a very small way in actual house sales, but through other aspects of general practice i.e. valuations we are aware that, at best, the market is very static. Mortgage complications appear to be one of the biggest factors affecting the confidence of the property market.

Peter M Hayward FRICS, Hayward Tod Associates LTD, Carlisle, Cumbria, 1228810300 - Sales are very hard won. Over 500k interest is very weak, not through lack of desire to move but more lack of ability to move through failure to sell. Confidence is low and the future seems difficult. Vendors will have to accept reduced selling prices to become proceedable and thus be able to negotiate a favourable next purchase. This is a big ask where equity held is generous, but under different circumstances a move may prove out of the question at this time. Continued European fiscal/economic issues will dictate how we go forward.

Richard Sayer BSc FRICS, Rook Matthews Sayer, Alnwick, Northumberland, 01665 510044 - The market remains broadly flat. Sales and listings are satisfactory but viewings and new applicants are reducing, possibly due to the onset of summer holidays and the seasonal slow down. Improvements in the wider economy have not yet lifted property market confidence. We anticipate a steady market for the next quarter with no expectations of sharp adjustments up or down. Realistically priced homes sell well but mortgage availability and attractive rates remain a real problem to the industry.

Stuart Allan FRICS, Broadley & Coulson, Bishop Auckland, Co Durham, 01388 602656 - There is still a marked problem with a lack of first time buyers from the bottom end of the market and thus reflecting right up through the market.

Yorkshire & Humberside

Alex McNeil MRICS, Bramleys, Huddersfield, West Yorkshire, 01484 530361 - The market remains slow and subdued with a low level of transactions with the reality being that prices are still falling, albeit more slowly and at different rates depending upon sector.

Alex McNeil MRICS, Bramleys, Calderdale, Halifax, 01484 530361 - There are a low number of enquiries and new houses coming onto the market and there remains a low volume of transactions and it is predicted that it may be some time before there is any increase in confidence.

Ben Hudson MRICS, Hudson Moody, York, Yorkshire, 01904 650650 - A steady market, but at least turnover is slowly returning.

Bill Dale MRICS, Dale Eddison, Ilkley, West Yorkshire, 01943 817 642 - Difficult market conditions persist, although there continues to be a fair number of buyers in the £300,000 to £500,000 range.

Chris Clubley FRICS CAAV, Chris Clubley & Co., Market Weighton, York, 01430 874000 - The market is extremely price sensitive at present, we have had an increase in sales due to a higher level of investors at the lower end of the market.

David Blagden FRICS FNAEA, E.surv Chartered Surveyors, West Yorkshire, Yorkshire, 1423530001 - Static.

Edward Waterson ARICS, Carter Jonas, York, North Yorkshire, 01904 558201 - Activity is patchy but prices are holding their own as new instructions slow. Buyers remain very price sensitive but if a property ticks all the boxes they will buy.

Francis Brown FRICS, Norman F Brown, Richmond, North Yorkshire, 01748 822473 - Values continue to fall in a very sluggish market.

Ian Bebbington BSc MRICS, Ian Bebbington Estate Agents, Northallerton, Yorkshire, 01423 562531 - This month viewings and sales have slowed more than usual. This could be due to July being a holiday month, or just low public confidence.

John E Haigh BSc MRICS FAAV, Lister Haigh, Knaresborough, North Yorkshire, 01423 860 322 - Buyers waiting to get on to the housing ladder are still looking for assistance from the financial sector.

John Francis FRICS, Crapper & Haigh, Sheffield, South Yorkshire, 0114 272 9944 - Properties are still selling, but only if realistically priced.

Mark John Hunter MRICS, Grice & Hunter, Doncaster, South Yorkshire, 01302 360141 - Sales actually increased (quite significantly) in June and early July but only certain aspects of the market are saleable. In the last two weeks activity has drastically declined.

Nick Atkin FRICS, Ulllyott & Butler, Driffeld, East Yorkshire, 1377253456 - Market continues to be difficult. Offers are very low when they come forward.

Toby Millbank MRICS, Strutt & Parker, Harrogate, North Yorkshire, 01423 561274 - We are seeing a huge void between those houses that are 'best in class' achieving excellent results with competitive bidding on most occasions and those with a perceived problem being affected by 20% to 25% in some cases.

North West

Andrew Duncan MNAEA, J. B & B LEACH, St.Helens, Merseyside, 01744 22816 - Generally positive but very unpredictable, busy one day and quiet the next. We need more funding available and the credit scoring easing a little.

Andrew Holmes BSc(Hons) Dip Surv MRICS, Carter Jonas, South Lakeland, Cumbria, 01539 814908 - Activity and confidence remains good although we have seen a dip in buyer enquiries as we do every year at the start of the summer holiday period. Vendor aspirations in most cases now seem to be in line with the current market as more realistically priced property is introduced.

Brian Jackson FRICS, Ellis & Sons, Southport, Merseyside, 01704 534171 - Offers have fallen in number this month. Still a lack of first time buyers. The buy to let investors have also decreased. Less movement at the lower end of the market is having a knock-on effect upwards.

D.Coates MRICS, Venmores, Liverpool, Merseyside, 0151 236 0301 - The market remains flat, particularly, in the first time buyer range due to difficulties arranging finance. Many of these previously sought-after properties are being bought by speculators at considerably less than market value creating almost a two-tier tone of value.

David W Pearse FRICS, David W Pearse & Co, Mold, Flintshire, 1352700274 - Very quiet conditions - lack of confidence in view of constant stream of bad economic news.

John Halman FRICS, Gascoigne Halman, Wilmslow, Cheshire, 01625 460344 - Market activity in July was quiet but sales showed signs of improvement.

John Williams FRICS, Brennan Ayre O'Neill, Wirral, Merseyside, 1513439060 - The market enters the summer holiday period in a stable condition, supported by low interest rates but undermined by low consumer confidence.

Jonathan Clayton FRICS BSc, Bentley Higgs & Co., Blackpool, Lancashire, 01253 302928 - Relatively quiet market with static prices + values on expectation of 0.5% interest rates over next 8-12 months. If and when interest rates rise there could well be further sharp corrections in property values particularly to modern flat developments and modern estate houses.

Michael Fisher FRICS, Fisher & Wrathall, Lancaster, Lancashire, 01524 68822 - Smaller properties i.e. below £250,000 selling. Anything over £250,000 seems to be struggling until you get in the £700,000 region.

East Midlands

Christopher Shallice FRICS FAAV, Hix & Son, Holbeach, Lincolnshire, 01406 422 777 - The market is generally quiet. The problems of funding for purchasers remain.

David Blagden FRICS FNAEA, E.surv Chartered Surveyors, Lincolnshire, Lincolnshire, 1423530001 - Static.

David Hawke FRICS, David Hawke & Co., Worksop, Nottinghamshire, 01909 531450 - A very quiet month with reduced sales and instruction.

David Johnson Dip Arb FRICS MRICS, Readings Property Group Ltd., Leicester, Leicestershire, 0116 204 6157 - A delicately balanced housing market is now in the midst of the holiday season. Economic uncertainty is still being balanced by limited supply. Thus prices mainly static.

Edward Wreglesworth FRICS, Escritt Barrell Golding, Sleaford, Lincolnshire, 1529302271 - A weak market compounded by slow and restricted mortgage activity. We are still awaiting the full impact of the public sector cutbacks particularly the armed forces, which form a large section of our local community.

Ian J Shaw FRICS, Escritt Barrell Golding, Grantham, Lincs, 1476590211 - Still a price driven market. Very few new applicants. What has sold is bottom end property. Holiday time.

Martin Pendered FRICS, Martin Pendered & Co., Wellingborough, Northamptonshire, 01933 228822 - June and July have been very positive months for sales with competition for some properties. Stocks are, however, dwindling and activity is likely to decline as a result. We expect a quiet August but anticipate an improvement in supply and demand in September.



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Neil Hunt FRICS, Wilkins Vardy Residential Limited, Chesterfield, Derbyshire, 1246270123 - The summer holiday slow down has begun with reduced levels of activity in all areas. Vendor anxiety is the only growth point with many clients still in denial of the falls in value over recent years.

Peter Mountain FRICS, Peter Mountain, Louth, Lincolnshire, 01507 603 366 - Another very quiet month. I expect more of the same.

R L Bell BSc FRICS, Robert Bell and Company, Horncastle, Lincs, 01507 522222 - There is very little buyer confidence.

Stephen Gadsby BSc FRICS, Gadsby, Orridge, Derby, Derbyshire, 01332 296396 - Consumer confidence still fragile and realistically priced properties still attracting interest.

West Midlands

A Champion FRICS, Halls, Worcester, Worcestershire, 01905 611066 - Market is very individual. Strong interest in some houses. Others no interest at all. Very price sensitive.

Andrew Grant FRICS, Andrew Grant LLP, Worcester, Worcestershire, 7976982742 - Whilst the activities of all buyers are heavily influenced by price, sellers are still inclined to overreach the underlying market price level. Therefore managing sellers' expectations is a challenge however, as always, the best quality properties continue to sell with much greater ease.

Andrew Oulsnam MRICS, Robert Oulsnam & Co., Barnt Green, Birmingham, 0121 445 3311 - Levels of enquiry and interest has dropped and sales are proving increasingly difficult to hold together with endless problems appearing in changes.

Andrew Perrin MRICS, Fraser Wood Mayo & Pinson, Walsall, West Midlands, 01922 627686 - It would appear that the first time buyer/investor market is very poor due to lending criteria/deposit required for first time buyers and the return being insufficient for investors. We are finding that there is increased activity in the middle to higher end of the market in Walsall.

Brian Holt MA MRICS, Brian Holt Chartered Surveyors, Leamington Spa, Warwickshire, 01926 450999 - Economic climate causing lack of confidence.

Edward Gallimore FRICS, Edward Gallimore, Tenbury Wells, Worcestershire, 1584810436 - The sellers must be aware of their real market value.

Jeremy Dell MRICS FAAV, J J Dell & Company, Oswestry, Shropshire, 01691 653437 - Too much uncertainty in the economy for the property market to pick up.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, Worcestershire, 01562 821600 - A somewhat stagnant market where potential buyers are reluctant to commit. Individual country properties still in demand, however few proceedable buyers.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, Worcestershire, 01562 821600 - Still a relatively quiet market however more activity was seen earlier this year. Potential buyers nervous to commit in uncertain economic times, trend unlikely to change short term.

John Andrews FRICS IRRV, Doolittle & Dalley, Bridgnorth, Shropshire, 01562 821600 - Signs of an improvement in levels of enquiry, although conversion of an enquiry through to a completed sale is generally slow. Many potential buyers are waiting until their own properties are sold before seriously looking for an alternative property. Higher rate of conversion from viewings to sales has been seen earlier this year.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, Worcestershire, 01562 821600 - As more property comes for sale, more interest from potential buyers but few in a proceedable position. Improvement in sales in property for improvement and development with indications that developers are starting to acquire land and property. An encouraging sign, although sales still at a low level for the time of year.

John Ozwell FRICS, Hunters, Solihull, West Midlands, 01564 771000 - The market is consistent in that it is totally unpredictable. A good week for sales followed by a bad week is the norm. It's all about confidence and there continues to be a lack of it.

Ryan William BSc FRICS, Mcartneys LLP, Hay-on-Wye, Hereford, 01497 820778 - Much more activity as vendors expectations get more realistic and more buyers emerge. Still a strong demand for one off country houses, small holdings and cottages. Modern estate houses still difficult to sell unless competitively priced. Still fragile.

East Anglia

Christopher Philpot BSc FRICS, Lacy Scott & Knight, Stowmarket, Suffolk, 01449 6123834 - A good potential market is being held back by difficulties in raising mortgage finance.

Jeffrey Hazel FRICS, Geoffrey Collins & Co., Kings Lynn, Norfolk, 1553774135 - It remains difficult to secure sale instructions at the correct price. Purchasers are negotiating hard and unless a vendor negotiates, applicants will not buy.

John Pocock, Pocock & Shaw, Cambridge, Cambridgeshire, 01223 322552 - Continuation of a steady situation with a modest supply of property coming onto the market and a reasonable balance generally between supply and demand. Still competition for the most popular houses and a poor demand for the least favoured.

Strutt and Parker, Ipswich, Suffolk, 01473 220428 - Levels of enquires are up and offers coming in at more sensible levels but pricing still paramount to get viewings. Substantial price reductions happening from proactive vendors formulating in more viewings. More activity in the under £500k market than in the middle to top end of the market.

Neil Akerman FRICS, Akermans Chartered Surveyors, Suffolk, Suffolk, 01728 621 621 - Ability of the first time buyer to raise the required deposit remains a problem, and I do not see this situation changing in the short to medium term, particularly with the financial uncertainty in Europe and America.

Richard Bannister FRICS, Bannister & Company, Felixstowe, Suffolk, 01394 282828 - Despite the fact that June turned out to be best month of the year for sales, July did not follow on. The worsening market is partially the seasonal drop but also lack of confidence due to poor financial and job forecasts. Hopefully it will pick up as usual in the autumn but we have our doubts. Will be a tough year.

Simon Hickling MRICS FAAV, Macey & Son, Wisbech, Norfolk, 01945 583123 - To date we have sold only one property in 2011 to a first time buyer. Indications of the difficulty first time buyers are having in getting funds.

South East

Andrew Miller FRICS, Linay & Shipp, Orpington, Kent, 01689 825678 - Surprisingly high level of viewings; however few offers received as a result unfortunately. Buyers are not making compromises as they feel no urgency or pressure to panic buy.

Bryan Elphick FRICS, Elphick Estate Agents, Ashtead, Surrey, 01372 272321 - Uncertainty and holidays having precedence, signs of a shortage of stock.

Clive Rutland FRICS, Rutland Chartered Surveyors, Southampton, Hants, 023 8066 3451 - The market is still drifting without real direction and without a freshening wind of more mortgages to first and second time buyers it will be in the doldrums for some while yet. Pirates in the form of residential investors are roaming the seas for possible booty now that rents are rising and the rewards to be plundered appear better. The horizon is still cloudy and whilst the Bank of England have kept weather conditions calm with low interest rates the outlook is uncertain. If clouds appear in the form of higher rates then a large number of over laden 'Buy to Let's' are likely to founder. The hope is that not all will sink without trace. A case of steady as you go for Cowes Week and beyond. I am increasing my crew for the weather system that will give us a down wind run for homes.

David Boyden BSc MRICS, Boydens, Colchester, Essex, 01206 762244 - Hopeful buyers struggling to sell.

David Nesbit FRICS, D.M.Nesbit & Company, Portsmouth, Hampshire, 023 9286 4321 - Very quiet for the holiday period. Buyer confidence is low and some vendors remain obstinate when re pricing is required. The wider economy gives little ground for optimism for the remainder of this year. A difficult and frustrating market, yet properties have to be sold.

David Parish FRICS, Gates Parish & Co., Upminster, Essex, 01708 250033 - The market is particularly active in the lower price ranges. There is little interest at present in properties over £500,000.

David Sherwood MRICS, Fenn Wright, Colchester, Essex, 01206 216556 - Apathy seems to be prevalent throughout the market, vendors are not under any pressure (debt) to reduce asking prices and demand is equally sporadic and not particularly enthusiastic. All in all continuing stagnation.

David Smith BSc MRICS, Carte Jonas, Andover, Hampshire, 01264 342342 - Becoming a buyers market as discerning purchasers look to take advantage of the market place. As always in this part of North Hampshire there remains an exceptional demand for the 'one off' properties, where above market value figures can still be obtained but that is the exception not the rule.

Edward Robinson MRICS, Robinson, Maidenhead, Berkshire, 01628 637600 - Lack of stock is keeping values high. Price sensibly and you will have a lot of interest.



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Geoffrey Chapman FRICS, Barker Associates, Essex, Essex, 01279 647111 - Availability and finance remain an issue. First time buyers still struggling to get together a suitable deposit.

Geoffrey Chapman MRICS, Barker Associates, Bishop's Stortford, Hertfordshire, 01279 647111 - Availability and finance continuing to be a minor irritant. First time buyers still struggling to obtain a deposit. Good interest for 'shared ownership' properties.

Geoffrey Holden FRICS, Parsons Son & Basley, Brighton, East Sussex, 01273 274011 - Instructions very slow, some serious purchasers about but they want value for money and drive hard purchasing prices.

Ian Perry FRICS, Perry Bishop & Chambers, Faringdon, Oxon, 01285 655355 - June and July have produced surprisingly high numbers of sales agreed. It is apparent that many buyers see the market as having passed its lowest point.

John Frost MRICS, The Frost Partnership, Gerrards Cross, Buckinghamshire, 01494 680909 - Market over £1,000,000 slow and difficult. Price absolutely key to achieving a sale. Anything overpriced not selling. Good levels of viewing but sales to viewing ratio very high - indicative of cautious buyers and overpriced stock.

John Frost MRICS, The Frost Partnership, Staines, Middlesex, 01494 680909 - Nothing specific to the local market. Decrease in number of instructions. Could just be seasonal with the school holidays. Viewings and sales very similar to last month so no significant changes to the market.

John Frost MRICS, The Frost Partnership, Burnham, Buckinghamshire, 01494 680909 - As is usual the holiday period in July has dampened down activity and a number of vendors coming into the market after the holidays, not anticipating a real increase until the end of August.

John Frost MRICS, The Frost Partnership, Ashford, Middlesex, 01494 680909 - A slightly better month than June, but still not anywhere near the business levels we would like to see.

John Frost MRICS, The Frost Partnership, Windsor, Berkshire, 01494 680909 - Lower value, well priced stock is still receiving good interest. There is some indication that vendors understand that the market is finely balanced currently.

John Frost MRICS, The Frost Partnership, Beaconsfield, Buckinghamshire, 01494 680909 - If property is priced sensibly there is still strong interest. Those vendors who are not realistic will receive little interest in this market place.

John King MRICS, Quinton Scott, Merton, Surrey, 020 8971 6780 - We are experiencing a summer recession, enquiries have slowed while vendors accept reductions in asking prices to attract buyers.

Mark Everett BSc FRICS, Michael Everett & Co., Epsom, Surrey, 01372 273448 - Increased vendor price realism leading to more sales. Instruction levels falling as summer holiday period approaches. Buyer quality improving but market still price sensitive. Signs of improvement overall.

Martin Allen MRICS, Elgars, Wingham, Near Canterbury, Kent, 1227720557 - A pre-summer holiday flurry of activity has resulted in an increased number of agreed sales but this is proving to be a very small step towards achieving an exchange of contracts as any little problem with the property, finance, buyer or purchasers employment will result in withdrawal. Still a very fragile market.

Martin Seymour BSc FRICS, Crow Watkin, Reigate, Surrey, 01737 245888 - Achieved house prices are in the main just a little lower than their levels of spring as wider economic problems seem to be causing restraint on the part of many buyers.

Mike Hewson FRICS, Howard Cundey, Lingfield, Surrey, 01342 833333 - Great exchanges and completions but new instructions slow and sales are being made but it is hard work. The summer holidays are most certainly here.

Peter Fearn FRICS, Keats Fearn, Farnham, Surrey, 01252 718018 - This is one of the slowest markets I can recall in over 40 years experience. Sales are taking so long to progress, once agreed, that buyers and sellers are apt to withdraw at the last moment, often on a whim. The work involved for the poor (literally) agent is colossal compared to the fee received, which is coming under threat from increased competition.

Peter Mockett FRICS, Hilbery Chaplin, Romford, Essex, 01708 732732 - In view of the economic climate the market in this area is a lot better than maybe it should be.

Philip Hiatt MRICS, Your Move Philip Hiatt, East Grinstead, W Sussex, 01342 321142 - July followed the pattern of June and saw a reduction in applicants and sales. Lack of confidence and finance continue to depress the market and not too many signs of an uplift in August. We are hoping, whether it is a vain hope remains to be seen, for more activity in September with buyers wanting to be in by Christmas. Prices holding though, as limited stock.

Robert Green MRICS, John D Wood & Co., Lymington, Hampshire, 020 7352 1484 - Lymington and the New Forest is a very seasonal market, and is about to enter the holiday period. This will see an increase in the level of enquiries, although many will be 'window shoppers'. Normal levels of activity are likely to return in early September.

W J Hartnell FRICS, Simon Matthew & Co., Brentwood, Essex, 01277 355255 - There has been a marked improvement in house sales. The cheaper end of the market is beginning to move. This is unusual since the holiday period is almost upon us. We hope that the autumn will be busy. However, we see no increase in prices.

William Leschallas MRICS, Jackson-Stops & Staff, Burford, Oxfordshire, 01993 822661 - There is certainly activity in the market with good buyers about; however the market continues to be unpredictable.

South West

Colin Bowden FRICS, Dickinson Bowden, Dorchester, Dorset, 1305250402 - Positives-Mortgages are becoming easier to obtain. Negatives-Fear of job losses and insecurity.

David Dark FRICS FNAEA, Seldon Ward & Nuttall, Bideford, Devon, 01237 477997 - Investors continue to buy. First time buyers/first time sellers still have problems with mortgage availability. Increased demand from out of area buyers.

David J Dark FRICS, Seldons Estate Agents, Bideford, Devon, 01237 477997 - Investors in the lower price ranges continue to buy. This helps as mortgage availability for first time buyers and first time sellers is still proving to be difficult. Increased demand from out of area buyers.

David Mackenzie, Carter Jonas, Bath, Somerset, 01225 750900 - Bath is its own microclimate and property prices don't follow the national trend.

David McKillop BSc FRICS, McKillop & Gregory, Salisbury, Wiltshire, 01722 414747 - A good start to July, then went very quiet and now has picked up again. Lack of first time buyers, but have sold three investment properties. Village houses difficult to sell which is unusual. Not much confidence out there.

Ian Perry FRICS, Perry Bishop & Chambers, Cheltenham/ Cirencester/ Fairford/ Malmesbury/ Nailsworth/ Tetbury, Gloucestershire, 01285 655355 - June and July have produced surprisingly high numbers of sales agreed. It is apparent that many buyers see the market as having passed its lowest point.

Jeff Cole MRICS, Cole Rayment & White, Wadebridge, Cornwall, 1208813595 - The market is still patchy and very price sensitive. We expect things to go a little quieter during the school holidays. July has been very similar to June in terms of agreed sales. Wadebridge town continues to be very popular as buyers are more aware of travelling costs & perhaps reducing to one car per home.

Jeremy Bell FAAV IRRV, Greenslade Taylor Hunt, Burnham-on-Sea, Somerset, 01278 782326 - Most of the activity is at the lower end of the market (up to £200k mark). Very quiet generally at the higher end in this part of Somerset. A lot of the surrounding villages have either potential wind farm or new electricity pylon issues which is spooking the locals and deterring potential buyers. Until these issues are resolved one way or another, generally a very difficult market for the seller locally.

Mark Annett FRICS, Mark Annett & Company, Chipping Campden, Gloucestershire, 1386841622 - A more difficult market, but we are very busy. There could be pressure on prices but the good agent will come through.

Mathew Harvey BSc MRICS, Tayler & Fletcher, Bourton on the Water, Gloucestershire, 1451820913 - Lack of supply versus economic climate is resulting in a slow but strong market.

Peter G May FRICS, Minster Property Management Limited, Wimborne, Dorset, 01202 842812 - The early summer has been busier but not as busy as last year. Prices are currently holding up but I suspect they will fall back with decreased activity in the autumn and definitely over the winter period. Christmas is expected to start early.

Peter Symons FRICS, Stags, Totnes, South Devon, 1803865454 - Where price is right, demand is there.

Richard Addington MRICS, Savills, Devon, Devon, 01392 455745 - Some vendors are more prepared to accept lower offers as winter appears on the horizon.

Robert Williams MRICS, Robert Williams, Exeter, Devon, 01392 204800 - Prices generally stabilising after a couple of months of modest reductions to keep track of reduced amount of buyers.

Roger Punch FRICS, Stags, Plymouth, Devon, 01752 223933 - An encouraging month with the general sentiment of a very slowly improving market. Sales have often been provoked by attractively modest marketing prices, but this adjustment continues the confidence that we have for a reasonable sales level over the forthcoming months.

Simon Cooper FRICS, Stags, Exeter, Devon, 01392 255202 - July has proved to be a good month for new sales due to many vendors accepting lower prices on their properties. With correct pricing sales are taking place, often quite rapidly after coming to the market. There is still a feeling that prices will however still slide a little.

Stephen Morris MRICS IRRV, Davies & Way, Keynsham, Bristol, 01225 400400 - A stable market with good levels of activity.

William Morrison BSc MRICS, Knight Frank, Exeter, Devon, 01392 423111 - Prices need to come down.

Wales

D E Baker FRICS, David Baker & Company, Penarth, Vale of Glamorgan, 029 2070 2622 - Very quiet for the time of year. Prices dropping slightly in some types of properties, mainly flats and the top end of the market, otherwise stable.

David K. Jones FRICS, Jones and Redfearn, Rhyl, Denbighshire, 01745 351111 - The market continues to be up and down. Activity is up but prices are down. Sellers are being realistic so sales are being agreed. As ever money remains tight and things won't improve until realistic lending returns.

Kelvin Francis FRICS, Kelvin Francis & Co., Cardiff, South Glamorgan, 029 2076 6538 - The number of valuations for sale and instructions, have started to tail off, to be expected during the summer months. There are still plenty of potential buyers in the market, a surprisingly high proportion, in a position to proceed. Although more mortgage products, up to 95% are available, first time buyers are still cautious about entering the property market. There is a noticeable decline in the number of public sector employees, with package assistance, compared with twelve months ago.

Nigel Jones FRICS, John Francis, Carmarthen, Wales, 07967 593561 - Unemployed from local government had no effect. Funding is only issue restraining the market.

Paul Lucas FRICS, R.K. Lucas & Son, Haverfordwest, Pembrokeshire, 01437 762538 - Mortgage lending is easing but the time taken to confirm finance has deterred many transactions. The number of properties coming onto the market is increasing although the number of sales achieved is falling once again after a brief spurt in May.

Roger Davies MRICS, J J Morris, Cadigan, Ceredigion, 01239 612 343 - Seasonal enquiries for the coastal properties but only a few buyers actually capable of proceeding, many more entwined in property chains or incomplete chains. First time buyers still finding it difficult to get affordable funding. Some relaxation of criteria by banks could help a lot.

London

A W Griffith FRICS, Robert Sterling Surveyors LLP, Walthamstow, Waltham Forest, 0845 838 0930 - Much the same this month as last month, and as we come into the holiday season, I expect it to be no better next month.

Anthony Fieldhouse MRICS, Anthony Fieldhouse & Co, Greenford, LB of Ealing, 020 8813 0202 - At the lower end of the scale, the problem of obtaining mortgages for first time buyers is still the biggest brake on the market, have a notable effect on sales of studio flats, one- and two-bedroom flats particularly.

Bill Fisher, Craig Sheehan Surveyors, London, Hammersmith & Fulham W14, 0207 385 5020 - There is a degree of demand which is not being satisfied because of the restrictions in the availability of mortgages, in what is predominantly a first time buyers housing area.

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 no intention of buying anytime soon.

James Gubbins MRICS, Dauntons, Pimlico/Westminster, London, 020 7834 8000 - Market quieters as we enter the holiday period. No change to character of the market, just a reduction in activity.

James Hyman MRICS, Cluttons LLP, London, London, 020 7407 3669 - Strong buyer and seller confidence. Expecting a very good autumn market.

Jeremy Leaf BSc FRICS, Jeremy Leaf & Co., Finchley, Barnet, 020 8446 4295 - Sales activity held up reasonably well for us this month in spite of holiday season distractions - although first-time buyer numbers reduced. Stock shortages are still underpinning prices especially for three and four bedroom family houses though demand for brand new homes and land to put them on remains particularly strong.

John King MRICS, Quinton Scott, Wimbledon, London, 020 8971 6780 - There is still an active sector of buyers looking for the right property. While the majority of purchasers are making lower than expected offers. The overall activity level of sales is down by 15% compared to this time last year.

Keith Barnfield FRICS, Barnfields, Enfield, Middlesex, 020 8363 3394 - A very busy period with no sign of a holiday lull so far. A slight uptick in prices has been noted.

Luke Pender-Cudlip MRICS, Knight Frank, Wandsworth/Balham/Clapham, London, 020 8682 7777 - Things were quieter than usual in May and June. However, well priced stock is still selling well.

Robert Green MRICS, John D Wood & Co., Battersea, London, 020 7352 1484 - There is a huge demand from buyers across all property types, but a shortage of stock for them to buy. The quality of buyers is very strong, with a high percentage able to fund a purchase from cash.

Robert Green MRICS, John D Wood & Co., Belgravia, London, 020 7352 1484 - A chronic shortage of stock is the hallmark of the Belgravia market, due to the high number of discretionary sellers. This shortage has pushed prices beyond those seen at the previous peak of 2007.

Robert Green MRICS, John D Wood & Co., Chelsea, London, 020 7352 1484 - A continued shortage of supply, combined with strong demand from cash rich overseas buyers has seen the Chelsea and Knightsbridge markets continue to rise. We have yet to see any significant impact from the sovereign debt crisis, and it may fuel the market further as buyers look for a safe place to put their money.

Stephen Whitley FRICS, R Whitley & Co., West Drayton, Middlesex, 01895 442711 - More properties coming onto the market for sale is being accompanied by a greater number of new buyer enquiries. In theory this is a recipe for a greater sales volume.

Scotland

Alasdair Seaton BSc MRICS, D M Hall, Dunfermline and Environs/ Kinross, Scotland, 01383 621262 - Property market still slow and patchy. Houses still selling but showing no increase in sales prices.

Alex Inglis MRICS, CKD Galbraith, Kelso, Roxburghshire, 01573 224 244 - The market has improved this year although prices remain fairly static. The last month has been quieter due to the start of the Scottish school holidays. However, we are still selling and had 5 offers at a closing date today as well as a successful offer for a property that had been on the market for less than a week.

Andrew MacFarlane BSc MRICS, Graham + Sibbald, Hamilton, Lanarkshire, 1698422500 - Market conditions have remained steady in Lanarkshire. Increased number of Home reports leading to transcription reports for purchasers' mortgage within a three month period, remains a high number of refresh Home Reports for properties sold after 3-6 months and more. There has been increased evidence of Japanese Knotweed growth at several locations across Lanarkshire, providing additional difficulties to sellers, many mainstream lending sources will not provide mortgage funding without confirmation of removal by a specialist contractor under cover of a long term guarantee.

Brian Devine FRICS, Graham+Sibbald, Stirling, Stirlingshire, 01786-463111 - The market has been ticking over but there is no consistency from week to week, even day to day. Famine or feast best sums up the last few weeks but overall the level of activity, having regard to the general economic climate and holiday period, has been fairly encouraging. Constant stream of HR refreshes being requested which indicates properties are selling although many agents still holding too much stock.

Craig Henderson, Graham & Sibbald, Glasgow, Glasgow and West Scotland, 0141 332 1194 - There is no doubt that the market remains challenging, particularly since the school holidays started, and many families/ buyers are now focussed on holidays rather than house buying or selling. We normally see a general slowdown during the summer months, and the early evidence supports that this year is no different, however given the ongoing challenges in the market, that have existed during this year so far, if you are a buyer, then this is a good time to buy. If you are selling, then you have to be realistic in your price expectations if you wish to achieve a sale in a realistic timescale. Pricing remains a key issue, and there is no doubt that as buyers are prepared to 'shop around'.



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Darroch Robertson MRICS, Graham + Sibbald, Aberdeen, Aberdeen/Aberdeenshire, 01224 625024 - As is usual for this time of year, during school and annual summer holidays, market activity has slowed somewhat, with a reduction in numbers of properties coming to the market. Sales prices however still appear to be remaining relatively firm and continued requests to refresh Home Reports indicate properties are continuing to sell within reasonable time periods. At the top end on the market, high quality well presented and located properties in Aberdeen and western suburbs continue to achieve good sale prices, while the lower end flat market remains relatively static with sales of properties in good order continuing to fare better than those requiring refurbishment.

Donald Wooley MRICS, Allied Surveyors, Ayr, Ayrshire, 01292 260509 - The local market is currently flat, in line with normal seasonal activity in July. Properties are continuing to sell relatively steadily providing sellers are realistic in their expectation of value. First time buyer market remains slow and until this improves and mortgage finance becomes more readily available, there will be no significant change in the market.

Graham Tonner MRICS, Graham and Sibbald, Dundee, Tayside, 1382200064 - While fewer properties were brought to the market in June - the number of sales reported increased over June 2010. Estate agents are reporting that June 2011 was the best month for sales for a long time and this is a step in the right direction. Traditionally July and August are quieter months due to the holiday period

Grant Robertson MRICS, Allied Surveyors, Glasgow, Scotland, 0141 330 9950 - The market evidence is growing that modest price falls are needed to secure sales but this needs to be seen in context with sales times improving and different approaches from buyers i.e. confident or not. Some stability in evidence looking for the next 3 months but the autumn looks as if it may need some further price changes to bring about sales but only to the extent of 1 - 3%.

Ian Morton BSc(Hons) MLE MRICS, Bradburne & Co., St Andrews, Scotland, 01334 479 479 - Holiday season in full swing so we do not expect any movement until end of August. Still a buyers market with some bargains to be purchased due to sellers losing nerve.

Kevin Murchie BLE MRICS, Graham and Sibbald, Edinburgh, Lothians, 0131 225 1559 - The market has now entered the traditional holiday period and as predicted will slow down in the short term with perhaps some increased activity say end of august/beginning of September.

Malcolm Taylor FRICS, Bell Ingram Ltd., Forfar, Angus, 01307 462516 - General fall in demand.

Peter Bennet MRICS, Graham & Sibbald, Dunfermline, Fife, 01383 732030 - 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).

Rachel Bromby MA MSc MRICS, Smiths Gore, Scotland, 01343 823020 - RAF Base closure at Kinloss and uncertainty over RAF Lossiemouth.

Robbie Buchanan MRICS, Graham+Sibbald, Kirkcaldy, Fife, 1592266211 - An increased number of properties appear to be selling at prices closer to the asking price and value than in previous months although demand in some sectors is still fairly weak particularly for flats where there is an over supply. Increased rental demand is attracting some buy to let investor buyers back into the market with rents rising compared to prices which have dropped over the last year resulting in a higher return which has to be balanced with the prospect of zero capital growth at present.

Thomas Baird 1130499 MRICS, Survey Scotland, Glasgow, Strathclyde, 0800 567 7040 - Medium term to stay similar price range, however long term over next couple of years to increase.

Thomas Baird MRICS, .. Glasgow, Scotland, 0141 571 1238 - Slight increase in sales and more properties with interest in them. Expect sales to increase over the next 12 months.

William Murphy MRICS, Cruden Homes East Ltd, Edinburgh, Lothians, 0131 442 5775 - Very quiet July, hopefully due to holidays!

Northern Ireland

Aidan Conway MRICS, P Andrews Chartered Surveyors, Londonderry, County Londonderry, 2871263635 - There has been an increase in sales at the bottom level of the market as buyers take advantage of the reduced property prices.

Alexander Inglis MRICS, CKD Galbraith, Kelso, Roxburghshire, 01573 224 244 - We remain pleased with increased activity this year. However, the market is patchy and this month has been a bit quieter due to the school holidays. We are continuing to receive offers and had several offers at a closing date today, as well as a successful offer for a realistically priced detached bungalow which only went on to the market earlier this week.

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

Tom McClelland FRICS, McClelland Salter, Lisburn, Co Antrim, 028 92674121 - Despite wider downside risks activity levels increased in July. Sellers who are realistic on asking prices get interest and offers from buyers. There appears to be a feeling amongst viewers that prices are now within their reach

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