

Next release:
12 January

RICS housing market survey United Kingdom

Buyer interest continues to outstrip the fresh supply of property

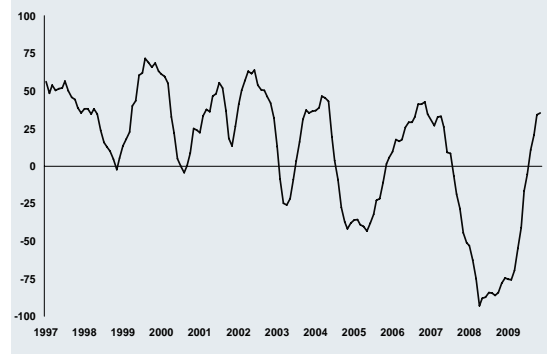
- The new buyer enquiries net balance slipped back a little further but still remains firmly in positive territory.
- New instructions rose for the sixth consecutive month but are still lagging behind the increase in buyer interest.
- The sales to stock ratio continues to edge up as do price and sales expectations although the latter two series increased at a more modest pace in November compared with October.

The seasonally adjusted net balance of surveyors reporting rising rather than falling prices over the last three months rose to 35% in November from 34%. This was the best reading since November 2006.

The latest survey provides further evidence that most housing market activity indicators continue to improve, albeit at a more modest pace than in previous months. The net balance of surveyors reporting an increase rather than a decrease in new buyer enquiries (compared with the previous month) slipped to 28% from 30% when measured on a seasonally adjusted basis. Although this is some way down on the recent high of 66% in June, it still indicative of an increasing level of buyer interest in the market. The agreed sales net balance tells a broadly similar story with the positive net balance slipping back to 24% from 28% in October.

Meanwhile, the net balance of new instructions recorded its sixth consecutive positive reading with the November number being the highest since May 2007. Even so, the implication of the latest set of results is that fresh supply of stock is continuing to lag behind the increase in demand; significantly, the inventory of property on the market slipped back for the first time in five months. This imbalance is most clearly visible in the sales to stock ratio which rose to 31 from 30 in October. The last time this series posted a higher reading was two years ago.

Price changes in England and Wales
% balance of surveyors



Surveyors' expectations remain generally upbeat and consistent with the tightening in market conditions. The net balance of respondents anticipating further price rises over the next three months was +28% compared with +31% in the previous survey. Meanwhile, the net balance of sales expectations currently stands at +22 which is down from the October outturn of +29.

From a regional perspective, the net price balance suggests that prices are continuing to rise most rapidly in London and the South East. At the other end of the scale, prices were unchanged in the North while they recorded only the most modest of gains in the West Midlands. Despite this, price expectations remained positive in every region of England and Wales for the third successive month. New buyer enquiries are strongest in London and the North West while the new instructions net balance is weakest in London and East Anglia. Scotland is also seeing prices continuing to edge upwards helped by a lack of supply.

	Proportion of surveyors reporting a rise, fall or no change in house prices over the last three months				Prices	Stocks of	Completed
	Rise %	Same %	Fall %	Balance**	Balance**	homes on books	sales*
	-----Not Seasonally Adjusted-----				-----Seasonally Adjusted-----		
Jun-09	14	56	30	-15	-17	57	13
Jul-09	14	62	23	-9	-6	61	15
Aug-09	24	61	14	10	10	63	17
Sep-09	31	54	15	16	21	64	18
Oct-09	37	52	11	26	34	64	19
Nov-09	35	55	10	25	35	61	19

* House sales over the past three months

** 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 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 = 276

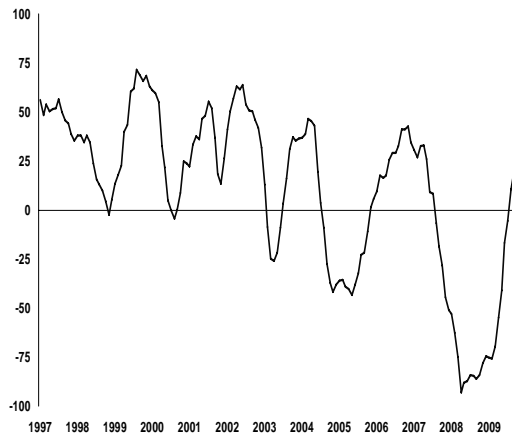
National information

Prices

The seasonally adjusted net balance of surveyors reporting rising rather than falling prices improved from 34% in October to 35% in November. That was the highest reading since November 2006.

From a regional perspective, no area in England and Wales now has a negative net price balance. The reading is most positive in London and the South-East with the North and the West Midlands the laggards. Prices are, meanwhile, continuing to rise in Scotland although the net balance of +15 was actually the lowest since June.

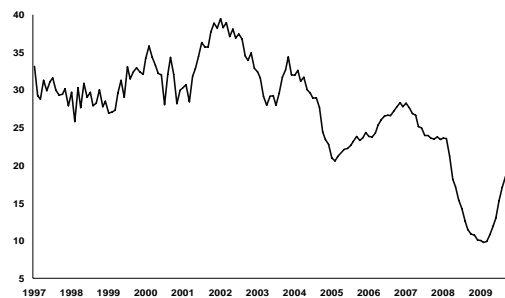
Property prices in England & Wales
% balance, seasonally adjusted



Property sales

Average property sales per surveyor (over the last three months) remained unchanged at 19 in November. This is the highest level of activity since March 2008.

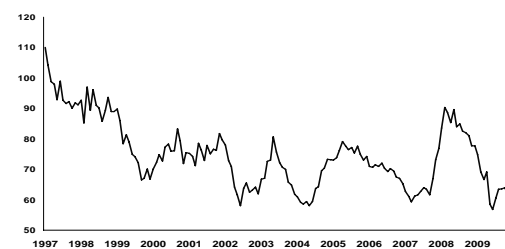
Property sales in England & Wales
Average per surveyor, three month period



Stocks of property

The average stock of unsold property on surveyors' books slipped from 64 to 61 over the course of November. This was the weakest reading since July.

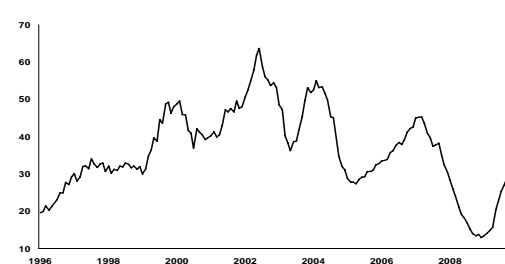
Unsold stocks of properties on surveyors' books, Eng & Wales
Average per surveyor, end period



Sales to stock ratio

The ratio of average sales to the average stock of unsold property on the market—a gauge of market slack and a lead indicator of future price changes—increased from 30 to 31 in November. London saw the sharpest rise over the month followed by the South East.

Ratio of sales to unsold stocks of properties on surveyors' books, Eng & Wales
%

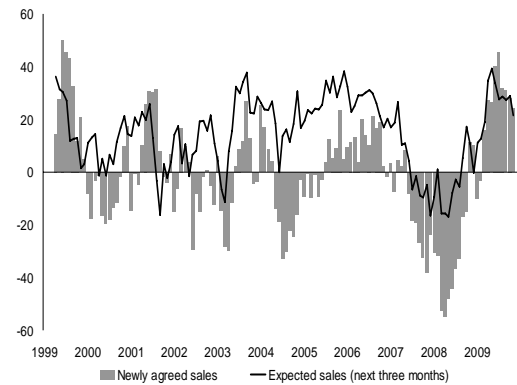


Newly agreed sales / Expected sales

Newly agreed sales, measured on a net balance basis, were positive for the ninth consecutive month although, at 24, the reading has edged down from 28 recorded in October. From a regional perspective, the strongest increases are taking place in London followed by the West Midlands, Wales and Yorkshire and Humberside.

Confidence in the sales outlook in England and Wales slipped back from 29 to 22 in November. Sales expectations remain positive in every region.

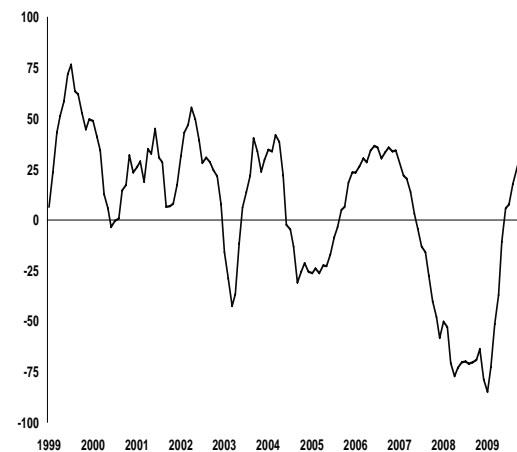
Change in newly agreed sales / Expected change in sales
% balance, seasonally adjusted, England & Wales only



Expected prices

Confidence in the price outlook remained positive for the sixth consecutive month but the net balance retreated from 31 to 28. In England and Wales, price expectations remain positive in every region for the third consecutive month. Price expectations are strongest in the North West followed by the South East and the South West.

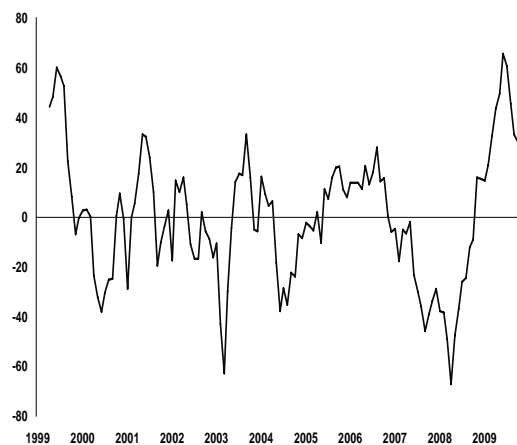
Expected change in prices, next three months
% balance, seasonally adjusted, England & Wales only



New buyer enquiries

New buyer enquiries continue to grow relatively strongly compared to the previous month. The November net balance edged down a bit further to 28 from 30 in October. In the latest survey, the net balance was positive in all the regions of England and Wales except East Anglia and the North. The strongest increases in new buyer enquiries are taking place in the North West and London.

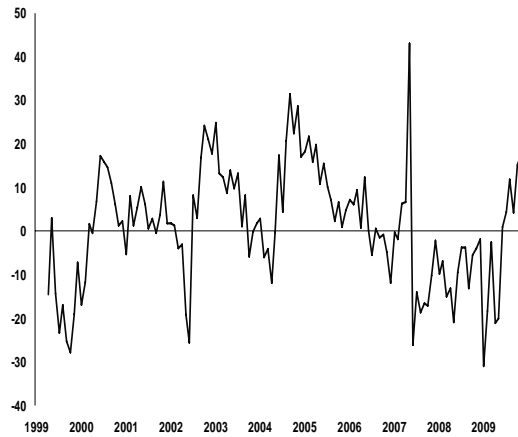
Change in new buyer enquiries over the past month
% balance, seasonally adjusted, England & Wales only



New instructions

New instructions to sell property rose for the sixth consecutive month and stood at 18 in November compared to 15 in October. The net balance was positive in every region of England and Wales for the second successive month. New instructions were rising the fastest in Wales, the North and the North West while the most modest gains were in London and East Anglia.

Change in new instructions, past month
% balance, seasonally adjusted, England & Wales only



Regional information

Price summary*, United Kingdom

Proportion of surveyors reporting changes in price over last three months

Price change (%) by band	Price rise -----					Price fall -----				
	> +8,	+5 to 8,	+2 to 5,	0 to +2,	Same,	0 to -2,	-2 to -5,	-5 to -8,	> -8	Balance**
North	0	0	0	1	83	16	0	0	0	-15
Yorkshire & Humberside	0	0	3	15	64	9	5	4	1	-2
North West	0	0	2	37	54	6	0	0	0	33
East Midlands	0	1	10	12	63	10	2	1	0	9
West Midlands	0	0	0	16	61	22	0	0	0	-6
East Anglia	0	0	1	14	74	9	1	1	0	5
South East	0	1	11	46	39	3	0	0	0	54
South West	0	1	4	26	64	5	0	0	0	25
Wales	0	0	0	4	85	5	6	1	0	-8
London	2	14	14	36	27	7	0	0	0	60
Scotland	0	0	1	20	73	6	0	0	0	15
Northern Ireland	0	0	0	14	59	11	13	2	0	-12

* Not Seasonally Adjusted

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

Activity summary* England, Wales & Scotland

Balance of surveyors reporting changes (%)**

	Prices		Expected Sales		Expected Prices		Buyer Enquiries		New Instructions	
	Nov-08	Nov-09	Nov-08	Nov-09	Nov-08	Nov-09	Nov-08	Nov-09	Nov-08	Nov-09
North	-87	0	-19	65	-65	4	0	-9	-4	36
North West	-74	39	14	42	-54	54	5	57	-18	36
Yorkshire and Humberside	-90	8	10	19	-73	15	26	30	10	13
East Midlands	-91	18	4	16	-77	13	-6	19	-19	26
West Midlands	-72	2	12	6	-62	25	45	27	38	22
East Anglia	-76	18	0	7	-71	16	12	-33	-27	1
South East	-72	69	10	23	-65	44	15	31	-20	7
South West	-80	37	26	14	-56	33	48	36	21	21
Wales	-76	8	-1	11	-34	6	18	19	-24	51
London	-75	67	20	26	-68	21	-4	55	5	6
Scotland	-53	15	0	15	-43	28	35	18	18	-1
England and Wales	-78	35	11	22	-64	28	16	28	-4	18

* Seasonally adjusted

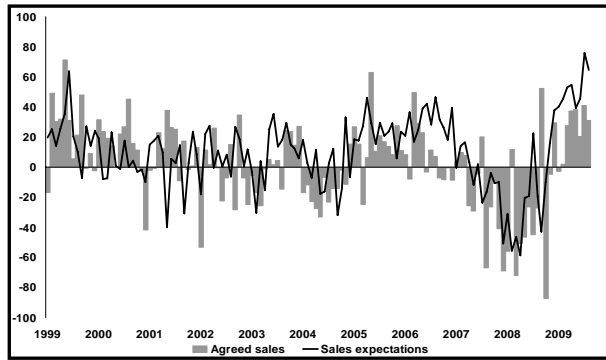
** Balance = the percentage of surveyors reporting/expecting a rise, minus those reporting/expecting a fall

North

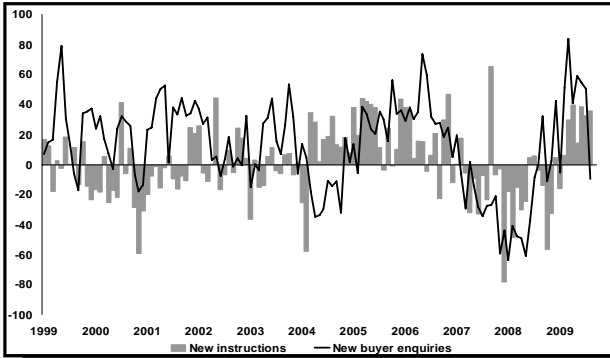
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	SA
	-----NSA-----					
Feb-09	1	44	56	-55	-72	
Mar-09	0	49	51	-51	-57	
Apr-09	0	45	54	-54	-61	
May-09	0	35	65	-65	-51	
Jun-09	6	59	34	-28	-31	
Jul-09	0	78	22	-22	-20	
Aug-09	0	100	0	0	-2	
Sep-09	9	83	8	1	2	
Oct-09	9	81	10	-2	6	
Nov-09	1	83	16	-15	0	

Balance figure is NOT the percentage change in prices but an indication of the trend in prices
 Figures may not sum up to 100% due to rounding errors
 NSA = Not Seasonally Adjusted, SA = Seasonally Adjusted

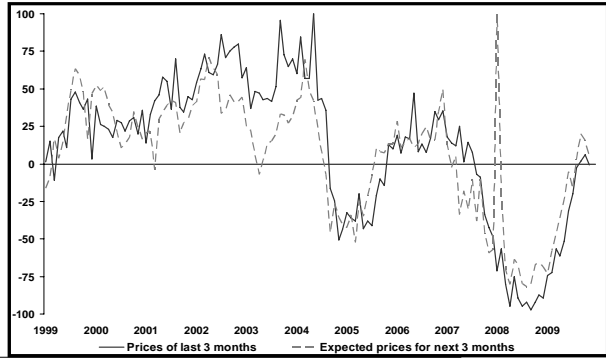
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

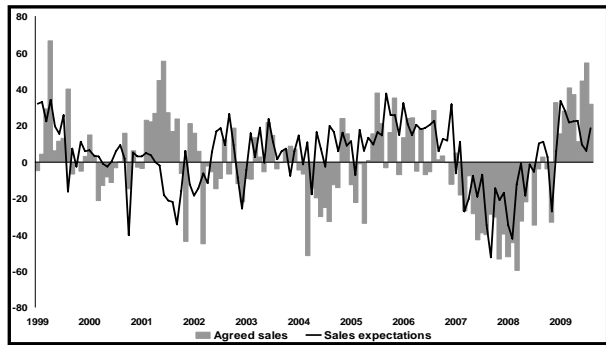


Yorkshire and Humberside

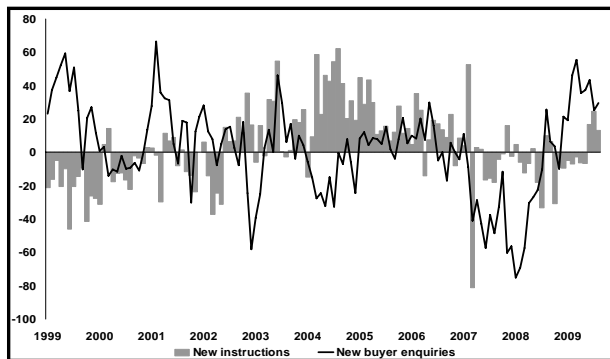
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	SA
	-----NSA-----					
Feb-09	1	15	84	-82	-90	
Mar-09	0	25	76	-76	-87	
Apr-09	0	22	79	-79	-89	
May-09	0	33	67	-67	-65	
Jun-09	2	52	47	-45	-46	
Jul-09	1	59	40	-38	-35	
Aug-09	2	68	31	-29	-27	
Sep-09	11	58	32	-21	-17	
Oct-09	12	69	19	-7	-2	
Nov-09	17	64	19	-2	8	

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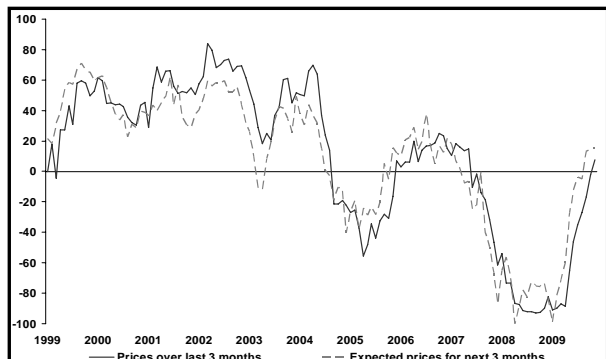
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

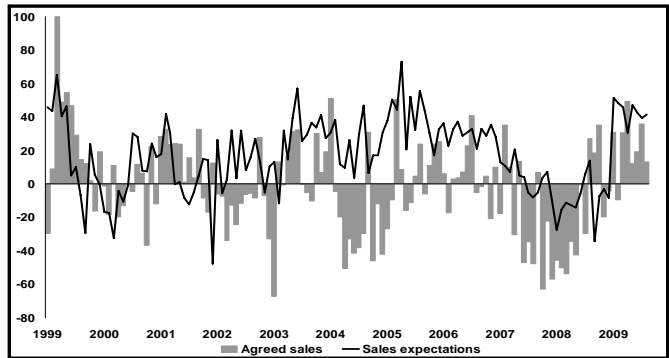


North West

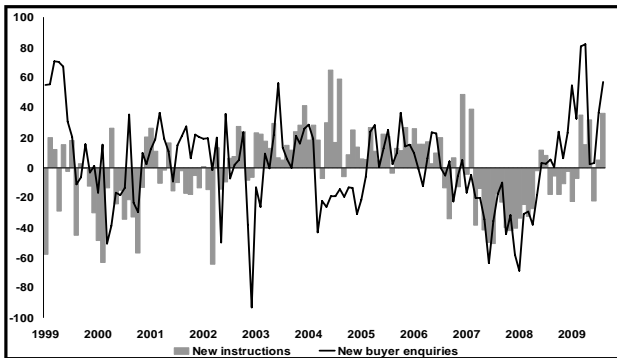
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	
	-----NSA-----				SA	
Feb-09	6	43	51	-45	-64	
Mar-09	1	24	75	-74	-89	
Apr-09	0	55	45	-45	-57	
May-09	0	69	31	-31	-34	
Jun-09	4	70	26	-22	-22	
Jul-09	7	66	26	-19	-13	
Aug-09	27	59	15	12	11	
Sep-09	15	63	23	-8	-6	
Oct-09	22	67	11	10	20	
Nov-09	40	54	6	33	39	

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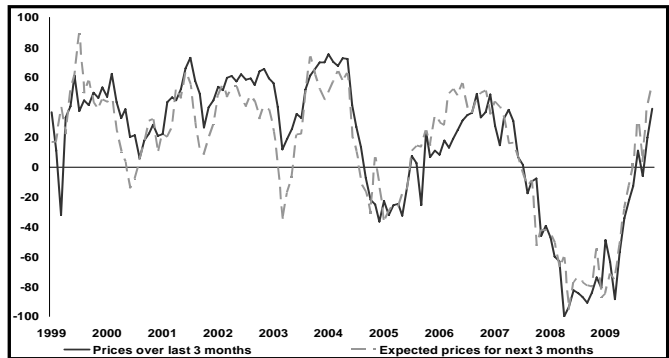
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

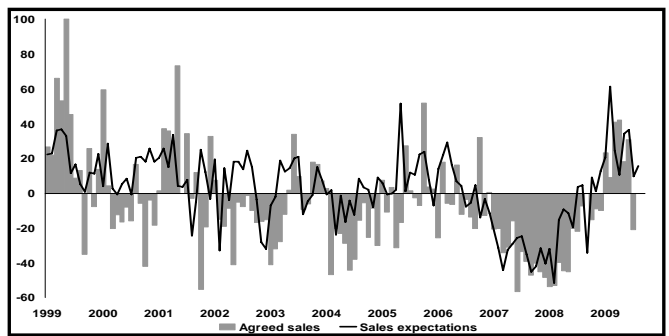


East Midlands

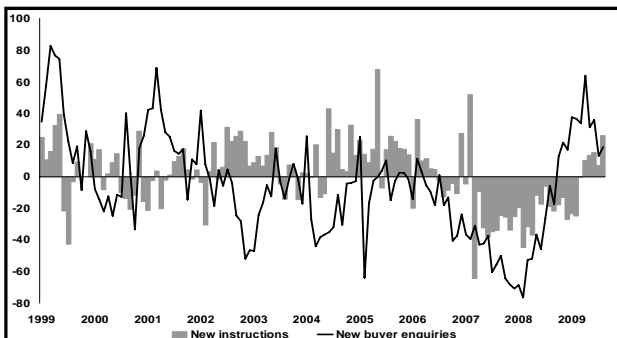
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	
	-----NSA-----				SA	
Feb-09	1	23	76	-75	-80	
Mar-09	0	22	79	-79	-87	
Apr-09	0	28	71	-71	-79	
May-09	2	42	56	-54	-57	
Jun-09	4	58	37	-33	-33	
Jul-09	6	67	27	-21	-22	
Aug-09	6	80	14	-8	-7	
Sep-09	12	71	18	-6	-1	
Oct-09	6	75	19	-13	-3	
Nov-09	23	63	14	9	18	

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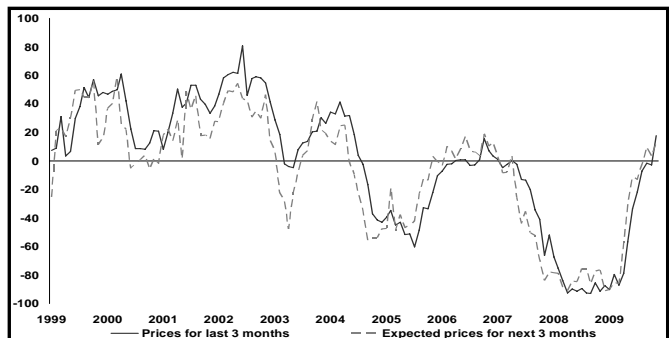
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

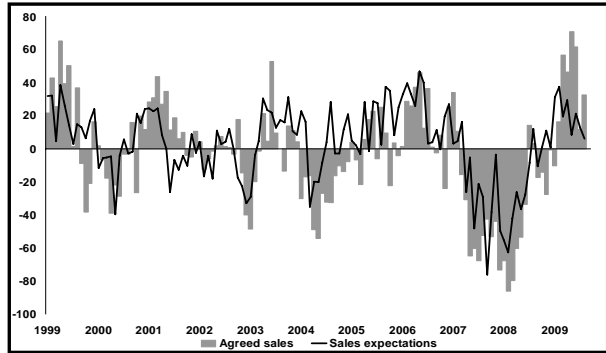


West Midlands

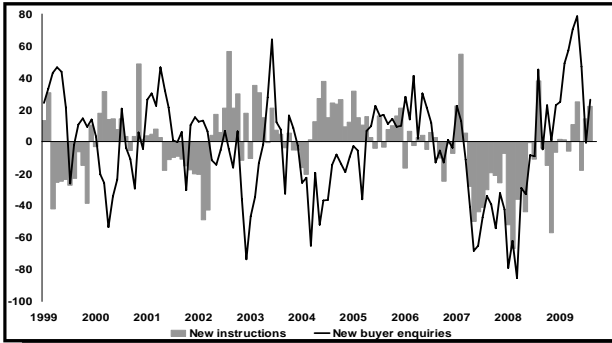
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	
	-----NSA-----				SA	
Feb-09	1	17	83	-82	-82	
Mar-09	0	29	71	-71	-79	
Apr-09	0	33	67	-67	-72	
May-09	0	34	66	-66	-81	
Jun-09	1	52	47	-46	-52	
Jul-09	2	76	23	-21	-24	
Aug-09	9	53	38	-29	-22	
Sep-09	25	48	27	-3	5	
Oct-09	19	54	27	-8	1	
Nov-09	16	61	22	-6	2	

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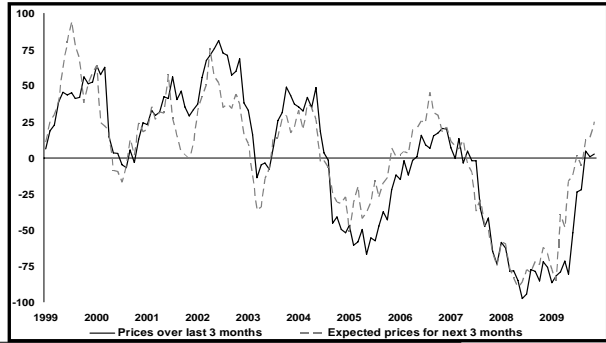
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

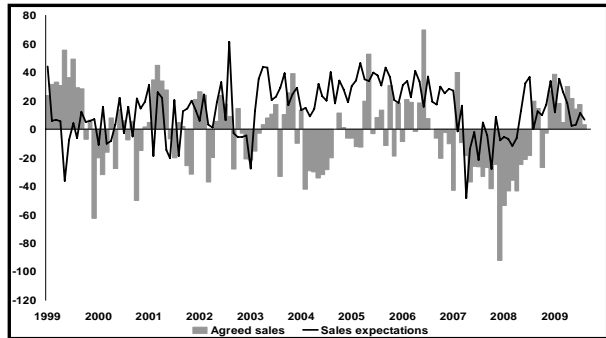


East Anglia

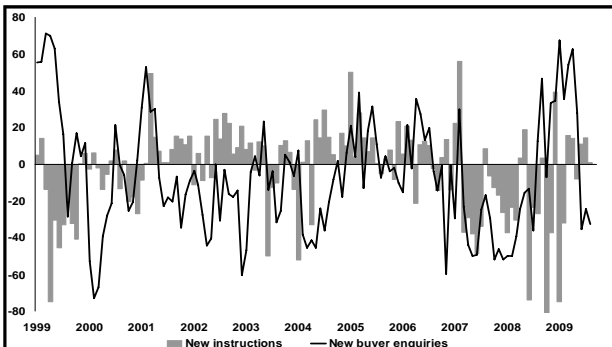
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	
	-----NSA-----				SA	
Feb-09	4	32	64	-60	-73	
Mar-09	3	31	67	-64	-78	
Apr-09	5	45	50	-45	-60	
May-09	0	59	41	-41	-49	
Jun-09	10	54	36	-27	-24	
Jul-09	12	51	36	-24	-20	
Aug-09	11	74	14	-3	-1	
Sep-09	18	59	23	-5	-1	
Oct-09	31	54	14	17	23	
Nov-09	15	74	11	5	18	

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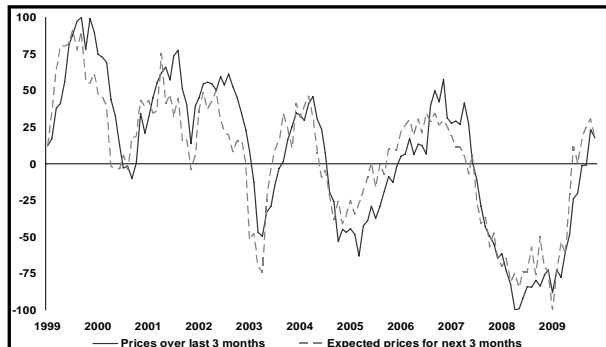
Changes in sales
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Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

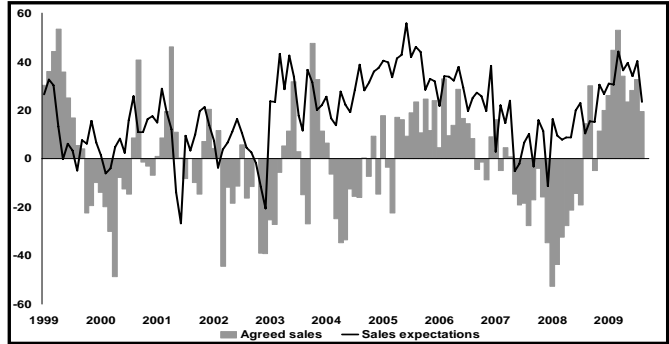


South East

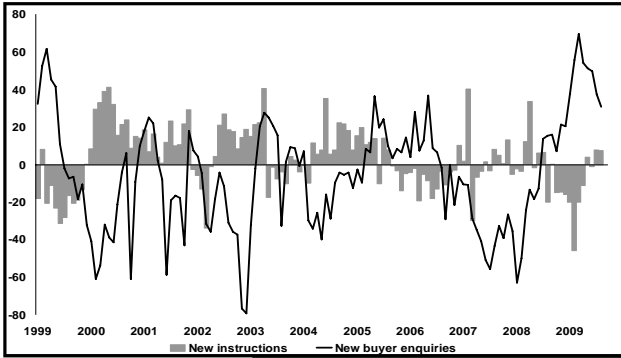
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	
	-----NSA-----				SA	
Feb-09	3	24	73	-70	-80	
Mar-09	5	37	58	-53	-64	
Apr-09	7	63	30	-23	-43	
May-09	6	63	31	-25	-26	
Jun-09	21	60	19	2	-2	
Jul-09	24	57	18	6	14	
Aug-09	47	47	7	40	36	
Sep-09	47	50	3	43	50	
Oct-09	56	40	5	51	62	
Nov-09	57	39	3	54	69	

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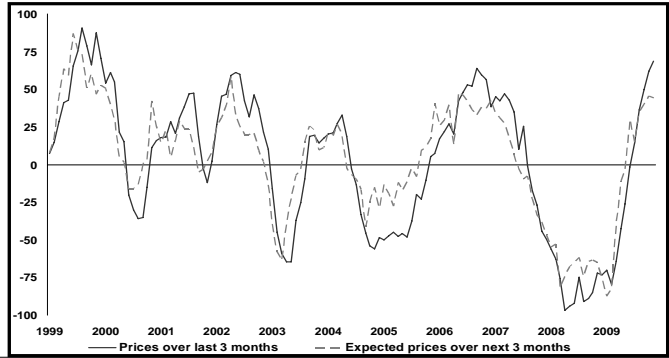
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

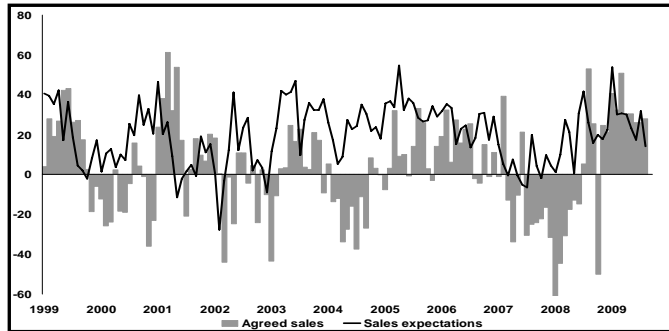


South West

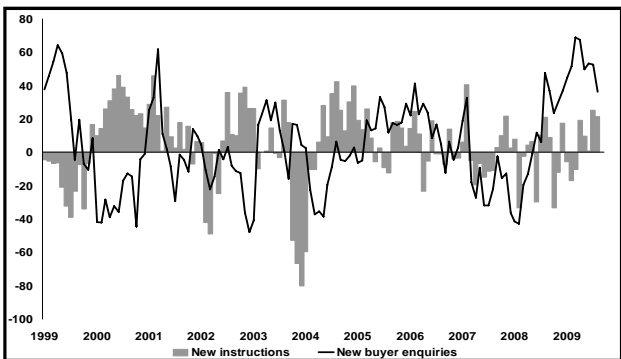
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Apr-09	5	53	43	-38	-47	
May-09	10	63	27	-17	-29	
Jun-09	23	63	15	8	11	
Jul-09	14	73	13	1	7	
Aug-09	28	65	7	21	24	
Sep-09	30	59	10	20	28	
Oct-09	41	56	4	37	39	
Nov-09	30	64	5	25	37	

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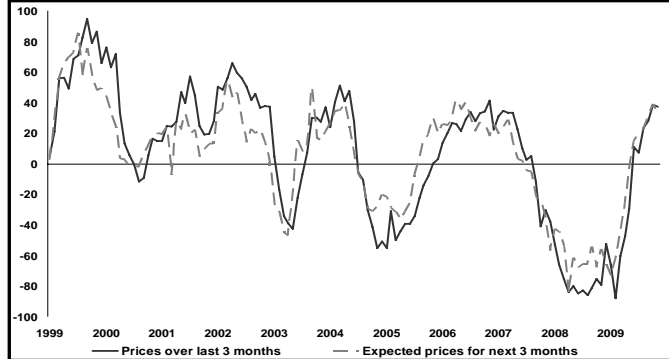
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

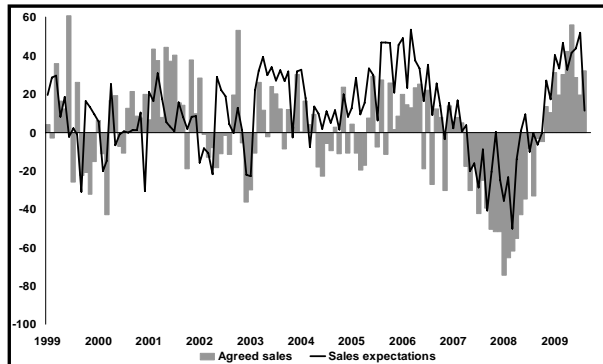


Wales

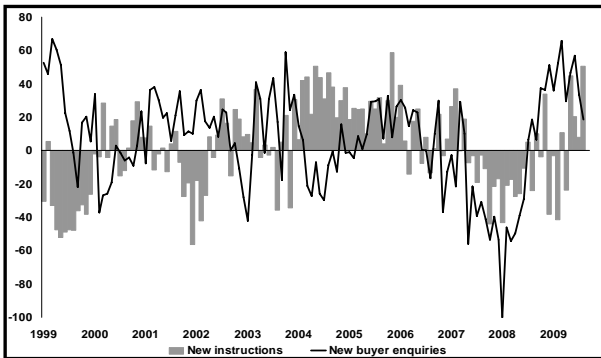
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	Balance
	-----NSA-----					SA
Feb-09	0	30	70	-70	-75	
Mar-09	0	39	61	-61	-66	
Apr-09	0	46	54	-54	-62	
May-09	1	51	48	-47	-60	
Jun-09	10	61	29	-19	-19	
Jul-09	1	58	41	-40	-42	
Aug-09	3	66	31	-27	-29	
Sep-09	13	65	22	-9	-13	
Oct-09	8	78	14	-6	0	
Nov-09	4	85	11	-8	8	

Balance figure is NOT the percentage change in prices but an indication of the trend in prices
 Figures may not sum up to 100% due to rounding errors
 NSA = Not Seasonally Adjusted, SA = Seasonally Adjusted

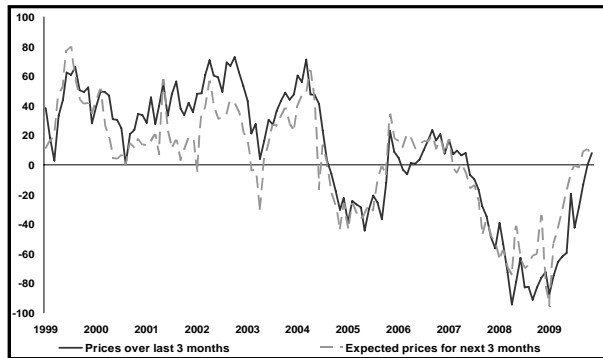
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted

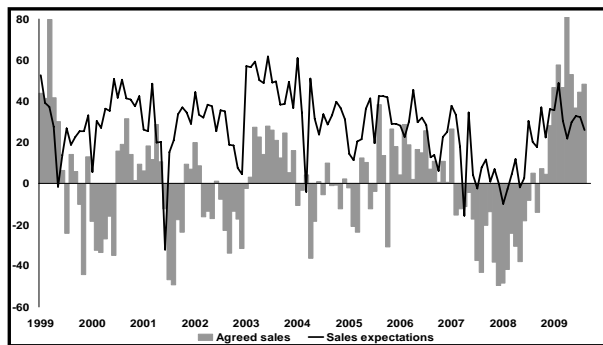


London

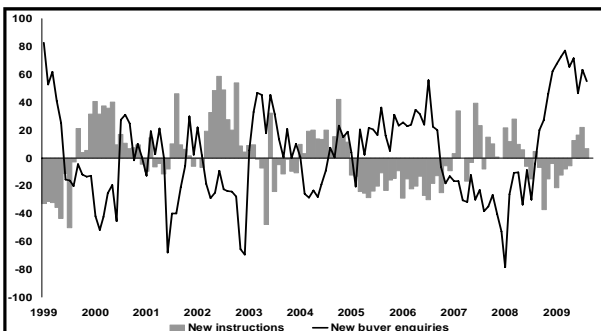
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance	Balance
	-----NSA-----					SA
Feb-09	4	35	61	-57	-62	
Mar-09	6	56	38	-32	-42	
Apr-09	17	57	26	-9	-24	
May-09	26	43	31	-5	-12	
Jun-09	36	40	25	11	7	
Jul-09	38	53	9	29	31	
Aug-09	48	49	2	46	45	
Sep-09	74	25	1	73	76	
Oct-09	86	14	0	86	95	
Nov-09	66	27	7	60	67	

Balance figure is NOT the percentage change in prices but an indication of the trend in prices
 Figures may not sum up to 100% due to rounding errors
 NSA = Not Seasonally Adjusted, SA = Seasonally Adjusted

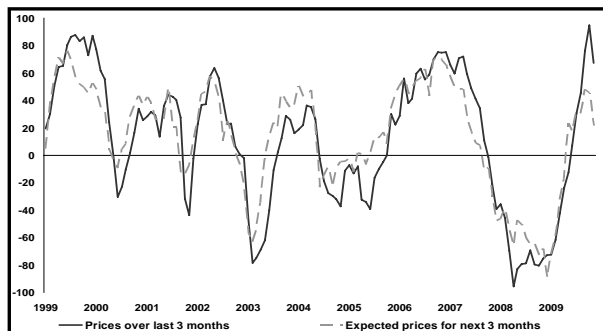
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted



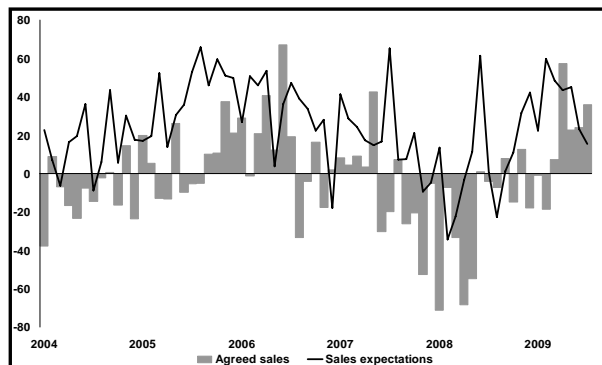
Figures for Northern Ireland have been collected since the beginning of 2006, though there is insufficient statistical time series information at present to provide market commentary. Summary statistics for the latest month are available on page five, while surveyor comments on the state of the market can be found from page 17.

Scotland

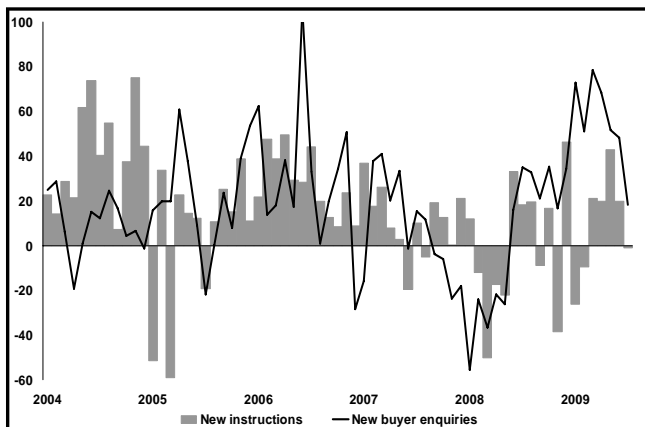
	Proportion of surveyors reporting a rise, no change or fall in prices over the past 3 months				Prices	
	Rise %	Same %	Fall %	Balance	Balance NSA	Balance SA
Feb-09	0	36	64	-64	-73	-73
Mar-09	0	59	41	-41	-56	-56
Apr-09	1	67	32	-31	-46	-46
May-09	10	81	10	0	-18	-18
Jun-09	7	82	11	-4	-4	-4
Jul-09	20	76	5	15	16	16
Aug-09	33	56	11	22	27	27
Sep-09	16	75	9	7	19	19
Oct-09	16	78	6	9	20	20
Nov-09	21	73	6	15	15	15

Balance figure is NOT the percentage change in prices but an indication of the trend in prices
 Figures may not sum up to 100% due to rounding errors
 NSA = Not Seasonally Adjusted, SA = Seasonally Adjusted

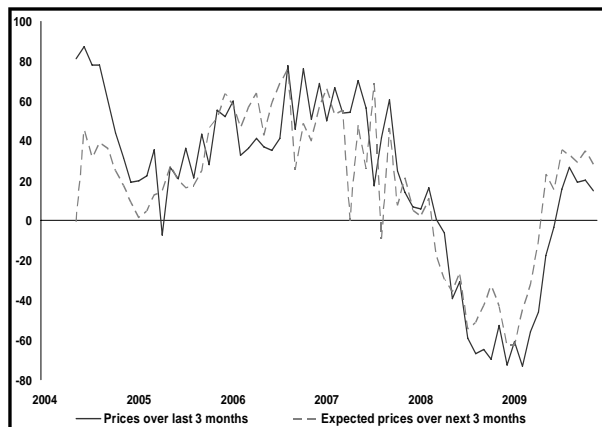
Changes in sales
% Balance, seasonally adjusted



Changes in enquiries and instructions
% Balance, seasonally adjusted



Change in prices
% Balance, seasonally adjusted



Chartered surveyor market comments

North

Neil Foster MRICS, Foster Maddison Property Consultants, Newcastle Upon Tyne, Tyne & Wear ,0191 222 1066 - Year on year data for November shows a significant increase in transactions and enquiries. The market remains fragile with unbelievable restrictions on mortgage advances; perhaps time for new players to enter the mortgage market and give traditional lenders something to think about?

P Airey MRICS, Paul Airey Chartered Surveyors, Sunderland, Tyne & Wear ,0191 514 5777 - Poor quality starter homes in fringe areas are selling to investors at 6-7%. Good quality houses in popular areas are selling at 2003 values. Some agents are buying instructions with over valuations to collect up front fees for marketing and advertising.

T H Brannen FRICS, Brannen & Partners, Whitley Bay, Tyne & Wear ,0191 251 7977 - Market has certainly picked up in the last quarter of the year. We await with anticipation 2010!

Sam Gibson, Strutt & Parker, Morpeth, Northumberland ,01670 516123 - Concerns beginning to show over general election in spring. Tempo of market significantly reduced since clocks changed. Attractively priced houses concluding at competitive bidding scenarios.

Douglas Farmer MRICS, Penrith Farmers & Kidd's plc, Penrith, Cumbria ,01768 862 135 - The advent of Christmas/New Year is clearly having an impact on market trends in all price ranges although we anticipate a quieter time during the winter months ahead. Richard Sayer BSc

FRICS, Rook Matthews Sayer, Bedlington, Northumberland ,01665 510044 - Prices stopped falling in the North East at the beginning of the year, but despite national statistics for several months saying prices are up, there is little significant evidence of price rises to date. The public's confidence is vastly improved which is slowly returning instruction and sales numbers to more normal activity levels. We do not see the return of Stamp Duty, the general election etc. causing too big a distortion on this slow, steady return to normality, which we believe the public and the industry will welcome.

Edward Watson BSc FRICS, Edward Watson Associates, Newcastle on Tyne, Tyne & Wear ,0191 281 2444 - A steady market with sensibly priced, well

presented houses selling quite well.

Paul McSkimmings BSc MRICS, Edward Watson Associates, Newcastle upon Tyne, Tyne & Wear ,0191 281 2444 - No dramatic increase has been seen in the number of instructions but agents appear to be busier than in previous months. Properties that are keenly priced, well presented and in good locations continue to sell.

Peter Hayward FRICS, Hayward Tod Associates, Carlisle, Cumbria ,01228 810300 - The late summer rally in sales is now showing seasonal signs of drying up - inevitably. Industry pundits show some caution as far as the market goes in 2010. We must now wait until after the seasonal break in order to see the reality.

Yorkshire & Humberside

Edward G Astin FRICS, Edward G Astin & Associates Ltd, Whitby, North Yorkshire ,01947 821122 - As the likelihood of the stamp duty holiday ending increases, further signs of small investors coming back into the market, financing through re-mortgage of own property

Michael Beech MRICS, Windle Beech Winthrop Ltd, Skipton, North Yorkshire ,01756 692900 - High deposits required, market uncertainty, unaffordable house prices.

Ken Bird MRICS, Renton & Parr, Wetherby, West Yorkshire ,01937 582731 - Sales still out performing new instructions as stock levels reduce and a number of reluctant landlords are now re entering the market for sale as chances of finding a buyer have improved over recent months.

N M Atkin FRICS, Ulyott & Butler, Driffield, East Yorkshire ,01377 253456 - Generally enquiries are low which - seasonally - is to be expected. However, enquiries received appear to be from genuinely interested parties.

Timothy Waring FRICS, Knight Frank, Harrogate, Yorkshire ,01423 530088 - Reduced stock of property to sell, particularly upper end (over £500,000) giving rise to upward pressure on prices in short term, especially with increased buyer registration.

Alex McNeil MRICS, Bramleys, Calderdale, Halifax ,01484 530361 - The market's momentum for next year would benefit from Government presence including permanent extension of the Stamp Duty thresholds, continuation of low base rates and a less penal system for the provision of social housing encouraging more development sites to come to the market.

B J Hudson MRICS, Hudson Moody, York, Yorkshire ,01904 650650 - A busier sales market but still lack of new houses coming onto the market.

David Copley BSc MRICS, Beadnall Copley, Harrogate, Yorkshire ,01423 503500 - Demand increasing, but supply of new instructions down.

John E Haigh BSc MRICS FAAV, Lister Haigh, Knaresborough, North Yorkshire ,01423 860 322 - There is uncertainty creeping back into everyday lives in respect of the availability of mortgage funding. This has been emphasised by covert

support of the banking sector which is only just coming to light.

Francis Brown FRICS, Norman F Brown, Richmond, North Yorkshire ,01748 822473 - Still some serious buyers around. Expect greater activity into the new year.

S G Archer BSc FRICS, Verity Frearson, Harrogate, Yorkshire ,01423 562531 - There is still demand for sensibly priced property, despite Christmas looming. Affordability is still key but confidence is there for good stock.

John Francis FRICS, Crapper & Haigh, Sheffield, South Yorkshire ,0114 272 9944 - The market remains quiet overall, but on the positive side seems to have flattened out and be holding steady, rather than continuing to fall.

Mark Hunter MRICS, Grice & Hunter, Doncaster, South Yorkshire ,01302 360141 - The number of enquiries and sales (although not in proportion) has increased and November has been a far busier month than normal. However, the business is no longer seasonal; if the market is depressed (i.e. for the last 2 years) the fact that, for example, it is May does not mean that month will show positive activity. The actual number of sales is now being restricted by a lack of supply, partly because demand has increased at a time when most vendors do not want to place their property on the market.

Edward Waterson FRICS, Carter Jonas, York, North Yorkshire ,01904 558201 - A lack of supply continues to constrain the market but the ratio of offers to viewings is well up. Seasonal factors made themselves felt towards the end of the month.

North West

ShannonConway MRICS, King Sturge, Liverpool, Merseyside ,0151 242 6490 - Confidence is increasing at an alarming rate as buyers think they will 'miss the boat' if they don't buy now. Prominent in the market place are parents who are using their savings to buy properties for their children who are studying. For the first time in over 12 months properties are achieving asking prices and

bidding wars are starting to erupt.

Ian Macklin FRICS, Ian Macklin & Company, Hale & Hale Barns, Cheshire ,0161 980 8011/0161 928 9510 - The majority of sales are in the lower price range suggesting first time buyers and investors have returned to the market.

D C Coates, Venmore, Liverpool, Merseyside ,0151 236 0301 - Fear of interest rate increases. Withdrawal of self-cert mortgages. Unemployment concerns. Double dip recession? Chance of recovery now - could we drop back in Spring 2010 ?

Michael Fisher FRICS, Fisher & Wrathall, Lancaster, Lancashire ,01524 68822 - Remarkably good sales activity during October and November. New instructions managing to hold up.

Louis Rigby FRICS, J.B. & B. Leach, St Helens, Merseyside ,01744 22816 - As we would expect during November general activity across the board has reduced. This will continue during December/January, perhaps picking up towards the end of January 2010. The year to date however has been much better than 2008.

John Halman FRICS, Gascoigne Halman, Wilmslow, Cheshire ,01625 540044 - Sales are at a higher level but with lack of supply, prices could rise slightly. Well presented and competitively priced properties are selling quickly. More instructions are needed.

Shannon Conway MRICS, King Sturge, Liverpool, Merseyside ,0151 242 6490 - We have an increase of parents of students buying 2 bedroom apartments for their children to live in where the second room is rented out to a friend. We also have tenants who have saved a deposit over the last year becoming more confident in the market and buying an apartment. In addition first-time buyer schemes such as shared ownership and Homebuy are proving very popular.

East Midlands

Ian Hunt, Connells, Milton Keynes, Bucks ,1908674141 - Still little stock on the market.

P E Mountain FRICS, Peter Mountain, Louth, Lincolnshire ,01507 603366 - A better November than last year, although very quiet towards the end of the month. We expect December to be a slow month and wait to see what the new year brings.

Stephen Saunderson FRICS, Stephe Saunders, Nottingham, Nottinghamshire ,1159234482 - Coming changes in stamp duty and VAT has given a mini-boost to activity.

Quentin A Jackson-Stops, Jackson-Stops & Staff, Northampton, Northamptonshire ,01604 632991 - As is normal at the end of November, the market has gone into "Christmas mode" with fewer valuations booked and low levels of new instructions. There is now a serious shortage of quality properties available. If this shortage persists into 2010, its effect will be to maintain price levels but if there is a flood of new instructions in the new year, then prices could slip back again.

Mark Newton FRICS, Newton Fallowell, Grantham, Lincolnshire ,01476 584185 - November was better than October which was consistent with 2008. Fingers are tightly crossed for a prosperous 2010 with no double dip.

Stephen Jeffery FRICS, Jeffery Jones Partnership, Derby, Derbyshire ,01332 200388 - Marked increase in new instructions over last four weeks, although seen slowdown in new buyer enquiries + sales agreed over last four weeks. Expect to see slowdown in all areas of market activity as 2009 draws to a close.

Christopher Shallice FRICS FAV, Hix & Son, Holbeach, Lincolnshire ,01406 422 777 - Very little change since our last report in October.

Edward Wreglesworth FRICS, Escritt Barrell Golding, Sleaford, Lincolnshire ,01529 302271 - The market here remains flat with no evidence whatsoever of a surge in activity to try to pre-empt the forthcoming increase in Stamp Duty.

C C M Charlton BSc FRICS, Savills, Nottingham, Nottinghamshire ,0115 934 8020 - Sellers still sitting on their hands. Mainly death, divorce and downsizing types. With low stock levels, agents are quoting very low fees which in a low turnover environment is commercial suicide.

William Downing BSc(Hons) MRICS, Pygott and Crone, Lincoln, Lincs ,01522 536777 - Slowing for the festive period, however buyers' confidence is still on the increase.

Stephen Gadsby BSc FRICS FSVA, Gadsby Orridge, Derby, Derbyshire ,01332 296007 - Prices as a general comment appear to have stabilised due, we feel, to lack of new instructions as demand equates to supply. Sales continue to be reasonable. Still a need to increase mortgage lending.

David Hawke FRICS, David Hawke & Co., Workson, Nottinghamshire ,01909 531450 - Market is becoming increasingly fragile with reduced sales, instructions and enquiries - sale prices under pressure. Hopefully this is a result of an early Christmas cool down! - but not so sure.

David Johnson Dip Arb FRICS MCI Arb, Readings Hope & Mann LLP, Leicester, Leicestershire ,0116 204 6153 - Lack of new stock is stifling demand, which in itself is precariously balanced. First time buyers continue to have problems with affordability either due to income multiples or deposit requirements. Some investment activity still apparent with prevailing low interest returns on money market alternatives.

Ian J Shaw FRICS, Escritt Barrell Golding, Grantham, Lincs ,1476590211 - A little more confidence generally with market activity good for November. Limited new supply to market with demand remaining strong in areas where supply is limited. Expecting seasonal slowdown in December. Concerned that in new year with election boding and Tories to abolish hip's, potential buyers will hold off marketing rather than committing to £300-£400 for a hip!

Neil Hunt FRICS, Wilkins Vardy Residential, Chesterfield, Derbyshire ,01246 270123 - The market continues to struggle along but has fallen away significantly since the summer. Premature publicity of a recovery and increasing values has inflated sellers expectations above what buyers are prepared to pay and made negotiating sales even harder.

Tom Casswell BSc FRICS Newton & Fallowell Bourne, Lincolnshire 01778 422567 "Over the last 3 months the market in my area has seen signs of a change. Now listings are down, but the stock we are selling is new stock priced

correctly. Old stock has either been withdrawn or still for sale.

West Midlands

Charles Ball MRICS, Bury & Hilton, Leek, Staffs ,01538 383344 - Seasonal drop in interest beginning to take effect.

Andrew Spittle RICS, Pace Property Solutions, Solihull, West Midlands ,0121 705 3028 - There are some signs that the rate of house price rises is beginning to slow as a greater volume of properties are being placed on the market and supply and demand is becoming more balanced. Confidence in the market may also be influenced by growing unemployment and the economy remaining in recession.

Andrew Perrin MRICS, Fraser Wood Mayo & Pinson, Walsall, West Midlands ,01922 627686 - There has been a slowdown during the whole of November. Hopefully this is just the Christmas lull starting slightly earlier. There is still activity in the sale market, and as long as properties are correctly priced and sellers are willing to negotiate, we are still agreeing a number of sales.

John Andrews FRICS IRRV, Doolittle & Dalley, Bridgnorth, Shropshire ,01562 821600 - Marked improvement in enquiries and sales during the autumn now starting to tail off as Christmas approaches. The Stamp Duty holiday has helped and needs to be extended to add further confidence to the market. More seller instructions needed to replace stock sold this autumn.

John Andrews FRICS IRRV, Doolittle & Dalley, Stourport, Worcestershire ,01562 821600 - After activity in the autumn, sales enquiries now starting to reduce as Christmas approaches. An encouraging end to the year, which it is hoped will be sustained in 2010.

John Andrews FRICS IRRV, Doolittle & Dalley, Kidderminster, Worcestershire ,01562 821600 - A better end to the year than was anticipated, as buyers show more confidence now property prices have reduced and appear to have levelled out. Still cautious buyers, although a better end to the year than the beginning. It is hoped that an

improvement will continue into 2010.

John Andrews FRICS IRRV, Doolittle & Dalley, Bewdley, Worcestershire ,01562 821600 - Encouraging volume of interest in property for sale, although reduced stock availability. There is more confidence amongst buyers, although more sellers needed to replenish stocks. Still hesitancy from sellers to move up-market with larger mortgage commitments until the economy stabilises. 2010 looks more promising.

Andrew Oulsnam MRICS, Robert Oulsnam & Co., Barnt Green, Birmingham ,0121 445 3311 - November sales have held up very well particularly with the more expensive property. New instructions are few however.

A Champion FRICS, Halls, Worcester, Worcestershire ,01905 611066 - Much stronger November for sales than 12 months ago. Largely in the price bracket 300 - 500. Demand outstripping supply - but correct pricing is still critical. Will be interesting to see whether there is an increase in new instructions in the new year.

Ryan Williams FRICS, McCartneys, Hay-on-Wye, Powys ,01497 820778 - Getting quieter as winter approaches although the ratio of sales to viewers is surprisingly good. Still too many overpriced properties on the market from uncommitted vendors. Some concerns about next spring with an election and likely further depressing economic news bound to affect demand.

East Anglia

Tom Goodley MRICS, Strutt & Parker, Norwich, Norfolk ,01603 617431 - Lack of supply of new stock in the run up to Christmas.

David M Potter FRICS, Potter and Co, Norwich, Norfolk ,01603 627201 - Lack of instructions, lack of buyers, prices looking too high, Christmas coming, all we can do is hope for upturn in instructions that might come about in spring.

Andrew Wagstaff MRICS, Bedfords, Burnham Market, Norfolk ,01328 730 500 - The market continues to hold up well even though we are

approaching Christmas, usually a quieter period. There is a shortage of good quality stock; those that do come to the market attract immediate interest, sometimes involving sealed bids.

Leslie Long FRICS, Newstead Estates Ltd., Colchester, Essex ,01206 760706 - Unwillingness of owners to market their properties resulting in shortage of supply, creating false impression of prices rising. Agreed sale prices still reflect aggressive bargaining by the limited number of able purchasers. Unnecessarily tight or exacting lenders' criteria are restricting the number of potential buyers to the detriment of the overall market activity level.

W J Hartnell FRICS, Simon Matthew & Co., Ingatestone, Essex ,01277 355255 - The market is improving. However, purchasers are being very selective. The market will probably slow due to Christmas.

Raymond Smith FRICS, Watsons Residential, Norwich, Norfolk ,01603 226522 - After a reasonably positive run the market finally appears to be slowing slightly although no more than is to be expected coming up to December. As always right property, right price, right location will sell.

Faisal Oshodi BSc(Hons) MRICS, Russen and Turner, Kings Lynn, Norfolk ,01553 768361 - In the last month and a half the property market has quietened down in West Norfolk. This is mainly down to the time of the year. Russen & Turner have found that instructions have decreased, this in turn has translated into less sales. I feel that with Stamp Duty thresholds reverting back from £175,000 to £125,000 again in January 2010, this should create more confidence and more buyers committing to buying this winter. It is also considered locally that prices have 'bottomed out' and that now is a good time to buy considering increased levels in sales from 2008 to 2009.

David Burr MRICS, David Burr (Long Melford) Ltd., Long Melford, Suffolk ,01787 883144 - Buyer demand continues to improve with transaction levels across the middle to upper market unrecognisable compared to the dire picture of 12 months ago.

John Pocock FRICS, Pocock & Shaw, Cambridge, Cambridgeshire ,01223 322552 - We always expect the volume of transactions to reduce in the head up to Christmas but this year the problem is acute. The limited number of serious potential buyers are experiencing real problems in finding anything coming onto the market and stocks of available property are at the lowest point we can recall in recent years.

Simon Hickling MRICS FAAV, Maxey & Son, King's Lynn, Norfolk ,01553 767276 - A noticeable reduction in new properties coming to the market. Winter quiet period is here and buyers are being cautious.

Stuart Clarke MRICS, Clarke & Simpson, Framlington, Suffolk ,01728 724 200 - While it has been quiet compared to September and October, November has been busier than that of 2007 and 2008.

David Boyden BSc MRICS, Boydens, Colchester, Essex ,01206 762244 - Market generally better all round but feel a wave of negative media coming through.

Christopher Philpot BSc FRICS, Lacy Scott & Knight, Stowmarket, Suffolk ,01449 612384 - No seasonal tailing off so far.

David Knights MRICS, David Brown, Ipswich, Suffolk ,01473 222266 - Properties up to £250,000 continue to sell well if realistically priced, but there remains an acute shortage of property for sale especially over £300,000.

South East

David Sherwood MRICS, Fenn Wright, Colchester, Essex ,01206 763388 - Increased demand and reducing supply has added an impetus to the market that we haven't seen for the last 2 years which has resulted in some instances in guide prices being achieved where before sales were being agreed short of the guide.

Mark Eshelby MRICS, Latchmere Properties Ltd, Dorking, Surrey ,01306 876006 - The market continues to improve despite a lack of quality stock.

Arwel Griffith FRICS, Robert Sterling Chartered Surveyors, Walthamstow, Waltham Forest ,0845 838 0930 - Good steady levels of demand, Government must not knee jerk into thinking everything is now fine, stimulants must stay in place, particularly low interest rates.

Mark Charter MRICS, Carter Jonas, Oxford, Oxfordshire ,01865 511444 - Seasonal fluctuations are the cause of reducing applicants and stock levels.

Rob Wightman MRICS, Knight Frank, Hungerford, Berkshire ,01488 682726 - Demand is up but supply is limited.

Philip Hiatt MRICS, Halifax Estate Agents, East Grinstead, W Sussex ,01342 321142 - New instructions to sell slowed right down this month and signs that the market has run out of steam for the year. There are still buyers looking but they are tending to be selective and taking their time to agree a purchase. Prices levelling out for the time being.

DAVID NESBIT FRICS, D.M.Nesbit & Company, Portsmouth, Hampshire ,023 9286 4321 - There is a marked lack of instructions and demand is falling away. Despite the hike in VAT and stamp duty from January, purchasers are more busy preparing for Christmas and New Year. Small traditional houses are selling for owner occupation, speculative property is in demand but only if priced competitively. December will be quiet.

Mike Hewson FRICS, Ibbett Mosely, Tonbridge, Kent ,01732 770588 - Just when we were anticipating a slow down towards Christmas the market went the other way ! Just as many instructions, fewer new buyers but those out there are buying so double the number of sales this month over last month. Long may it continue.

Martin Allen MRICS, Elgars, Wingham, Canterbury, Kent ,01227 720557 - Market seems to be very price sensitive with most interest in the lower price bands. Surprisingly little affect on number of enquiries considering Christmas is just a month away.

Kevin Rolfe MRICS, Aitchison Raffety, St Albans, herts ,01442 875509 - Good month but entering Xmas season shortly so expecting a quiet period.

Kevin Rolfe MRICS, Aitchison Raffety, Watford, herts ,01442 875509 - Entering quiet season.

Kevin Rolfe MRICS, Aitchison

Raffety, Hemel Hempstead, herts ,01442 875509 - Still very active.

Kevin Rolfe MRICS, Aitchison Raffety, Berkhamsted, herts ,01442 875509 - Getting quiet due to seasonal factors.

Peter Haynes FRICS, Trenchard Arlidge, Cobham, Surrey ,01932 857395 - Market activity in November has slowed. There are few new instructions however a slowing of activity at this time of year is not unusual. The market remains a purchasers market if finance has been arranged!

Bryan Elphick FRICS, Elphick Estate Agents, Ashtead, Surrey ,01372 272321 - All a bit unreal, evidence of some good buyers, limited fresh stock, but little happening at bottom end.

Peter Mockett FRICS, Hilbery Chaplin, Romford, Essex ,01708 732732 - The market has been relatively buoyant (at much reduced levels) but mortgage availability for first time buyers is holding back any meaningful recovery.

Edward Robinson MRICS, Robinson, Maidenhead, Berkshire ,01628 637600 - Very difficult market to read for buyers. They will not buy anything they think is 'overpriced'.

Peter Fearn FRICS, Keats Fearn, Farnham, Surrey ,01252 718018 - The market is still suffering from a shortage of quality stock and shaky confidence on the part of both buyers and sellers.

David Smith BSc MRICS, Carter Jonas, Andover, Hampshire ,01264 342342 - There is a feeling in the market that "Christmas has come early", but fortunately there remain sufficient committed vendors and purchasers to keep ongoing transactional business. In the broader context, we should not be debating The Liberal Democrats' mansion tax proposal, but urge the Chancellor of The Exchequer to make drastic changes to the outdated stamp duty legislation - it is time for a change now.

Andrew Miller FRICS, Linay & Shipp, Orpington, Kent ,01689 825678 - Shortage of new instructions continues to frustrate potential sales and

market recovery.

Ian Perry FRICS, Perry Bishop & Chambers, Faringdon, Oxon ,01285 655355 - As is usual, we have sold more houses in October and November than any other time of the year.

John Frost MRICS, The Frost Partnership, Gerrards Cross, Buckinghamshire ,01494 680909 - The general lack of new instructions continues to keep prices high. We are entering the Christmas season and I expect that this will have an impact on new sales and instructions. There does seem to be fresh enthusiasm for the new year and we are seeing a lot of people that are suggesting they will start looking seriously in January.

Geoffrey Holden FRICS, Parsons Son & Basley, Brighton, East Sussex ,01273 326171 - Applicant activity has noticeably slowed down, valuations are up but new vendors taking time to come to the market.

John Frost MRICS, The Frost Partnership, Amersham, Buckinghamshire ,01494 680909 - A shortage of new instructions is leading to a shortage of new sales. A high number of prospective sellers are waiting until the new year.

John Frost MRICS, The Frost Partnership, Slough, Buckinghamshire ,01494 680909 - Limited stock locally has led to prices rising slightly.

John Frost MRICS, The Frost Partnership, Burnham, Buckinghamshire ,01494 680909 - Most of the properties seen over the past few weeks have not come into the market and plan to come into the market in the new year. There is evidence that possible sellers are being put off because of the lack of property to buy.

John Frost MRICS, The Frost Partnership, Windsor, Berkshire ,01494 680909 - The lack of stock in all price ranges have led to prices stabilising and rising slightly. The number of transactions is still restricted.

John Frost MRICS, The Frost Partnership, Ashford, Middlesex ,01494 680909 - The market has noticeably slowed over the past month. A lack of new instructions has dampened activity levels generally, although good quality instructions are coming onto the market and are achieving good interest.

Martin Seymour BSc FRICS, Crow Watkin, Reigate, Surrey ,01737 245 886 - The seasonal lull in activity has now started, following an active period, though it is noticeable that a number of buyers have encountered difficulties and delays in finalising mortgages.

John King MRICS, Quinton Scott, Merton, Surrey ,020 8971 6780 - A shortage of stock has increased demand. This is reflected in the number of offers received on the same property. Overall a better set of results than last year which hopefully will improve during next year.

Anthony Jamieson MRICS, Clarke Gammon Wellers, Guildford, Surrey ,01483 880900 - Still a real shortage of property to sell and demand totally outstrips supply. Any good property is being snapped up and prices are generally still on the increase. Everyone is waiting to see what the new year brings!!

John Frost MRICS, The Frost Partnership, Beaconsfield, Buckinghamshire ,01494 680909 - Good activity and confidence from buyers but lack of stock. There is evidence that there will be instructions coming to the market place early next year.

John Frost MRICS, The Frost Partnership, Staines, Middlesex ,01494 680909 - A lack of instructions in the area has had a positive impact on the number of viewings and offers we are receiving when we do take an instruction on the market. This shows that demand currently outweighs supply which is encouraging for future sellers.

Mark Everett BSc FRICS, Michael Everett & Co., Epsom, Surrey ,01372 273448 - A continuing shortage of instructions maintains pressure on prices, while valuations and vendor enquiries remain at all time lows. Plenty of good buyers but nothing to sell them. Frustrating market.

David Parish FRICS
Gates Parish & Co.
Upminster, Essex
01708 250033
"November was fairly quiet with a reduced number of sales agreed. Prices remain fairly stable. More activity is expected after Christmas but this might be inhibited by the current economic climate."

South West

William Morrison MRICS, Knight Frank, Exeter, Devon ,01392 423111 - Frustration from buyers due to perceived lack of stock

Richard Evans BSc MRICS, Colleys Surveyors, Taunton, Somerset ,07967 321239 - The market is still small, but has been active over the last month. A shortage of properties across the board (except flats) has continued to push up prices, but this increase is expected to level off over the winter.

The number of sales taking place is already showing signs of reducing.

Richard Evans BSc MRICS, Colleys Surveyors, Exeter, Devon ,07967 321239 - A shortage of new properties coming to market has continued to push prices up slightly pretty much across the board, but the market is not large and is likely to contract over the winter.

Richard Evans BSc MRICS, Colleys Surveyors, Plymouth, Devon ,07967 321239 - Prices pushed up slightly by a lack of supply. Agents report buyers waiting, but nothing available to buy. Potential negative equity thought to be holding vendors back. Usual seasonal slowdown anticipated over coming months.

Richard Evans BSc MRICS, Colleys Surveyors, Truro, Cornwall ,07967 321239 - Prices pushed up slightly by a lack of supply, but agents are seeing the number of prospective buyers reduce which, coupled with the seasonal slowdown, should see prices level out over the next three months.

Graham Thorne FRICS, THORNES Chartered Surveyors, Poole, Dorset ,01202 684004 - The availability of houses for sale continues to diminish and this shortage is having an effect on prices increasing, however the market for flats remains difficult with a general over supply.

Stephen Morris MRICS, Davies & Way, Keynsham, Bristol ,0117 9863681 - A Steady market with the normal seasonal reductions in the level of new stock coming to the market. Buyer activity still encouraging.

Jeff Cole MRICS, Cole Rayment & White, Wadebridge, Cornwall ,1208813595 - Early November was quite busy but has now tailed off somewhat as it always does at this time of the year. Expect to be quiet now until the new year.

OF Miles FRICS, Oliver Miles, Swanage, Dorset ,01929 426655 - Transactions remained at a reasonable level. Shortage of new instructions may result in increased prices in 2010.

Peter G May FRICS, Minster Property Management Limited, Wimborne, Dorset ,01202 842182 - Market activity has started to decline, the number of survey enquiries has fallen away. The market is starved of saleable stock. The shortage has stabilised prices but it is expected that values will decline over the next 3 months until the spring. Only those properties either in good locations or those offering good value for money will sell. We manage over 900 flats through our management department and buyer enquiries via solicitors remains very low. Flats did not enjoy the benefit of the better market activity through the spring and early summer. The outlook for flats remains uncertain.

Ray Saunders FRICS, Webbers Property Services, Braunton, Devon ,01271 378500 - Dire shortage of instructions. Plenty of buyers - good confidence levels. Mortgage situation still not good but getting better.

Clive Morgan FRICS, Rendells, Newton Abbot, Devon ,01626 353881 - There is a good number of cash buyers in rental accommodation looking to buy.

Mark Annett FRICS, Mark Annett & Company, Chipping Campden, Gloucestershire ,01386 841622 - Buyers are out there. Despite an election year the signs look good for better times ahead.

Alastair Martin FRICS, Carter Jonas, Wells, Somerset ,01749 677667 - Busy early autumn when a combination of low stock and increasing application led to a number of sales being achieved. Stock still low but a reduction in new applicants has resulted in a slowdown in activity.

Ben Marshall MSc MRICS, Woolley & Wallis, Shaftesbury, Dorset ,01747 852242 - Shortage of supply is fuelling demand.

Ray Saunders FRICS, Webbers Property Services, Bideford, Devon ,01271 378500 - Still have investors taking savings out of banks to put into property both for long rentals and holiday lets.

Ray Saunders FRICS, Webbers Property Services, Ilfracombe, Devon ,01271 378500 - Market still positive, sales still coming

through although things are a little quieter now the Christmas period is rapidly approaching. Still seems to be good instruction levels coming through.

Colin Bowden FRICS, Dickinson Bowden, Dorchester, Dorset ,01305 250402 - Lack of property coming into the market. May well keep prices high.

David Witherow FRICS, White Horse Surveyors Ltd., Trowbridge, Wiltshire ,01249 444465 - Small first time buyer properties selling quickly if accurately priced. Modern houses generally sell okay, some down valuations occurring. Roughly 5% discount off asking prices.

David Witherow FRICS, White Horse Surveyors Ltd., Chippenham, Wiltshire ,01249 444465 - Mortgages taking long time to process. Houses, if accurately priced, selling well (all sizes). Significant demand for first time buyers properties especially. Limited number of houses coming onto the market and agents report market 'slow'.

David Dark FRICS FNAEA, Seldon Ward & Nuttall, Bideford, Devon ,01237 477997 - Remains a busy market. Buyers now believe prices have reached the bottom of the market. With the prospect of prices rising again next year, buyers now keen to secure a purchase. Drop off in instructions this month as expected at this time of year.

John Cowley FRICS, Crisp Cowley, Bath, Somerset ,01225 789333 - November was a steady month, with fewer enquiries, but a satisfactory level of sales for the time of year.

David McKillop BSc FRICS, McKillop & Gregory, Salisbury, Wiltshire ,01722 414747 - This has been a much quieter month, but still far better than a year ago! I think the market has run out of steam leading up to Christmas and it is difficult to persuade sellers to get their properties onto the market now as opposed to the new year. Some mortgages are proving difficult and very slow to process. No real increase in repossession. Prices holding steady. Roll on January.

Simon Cooper FRICS FAAV, Stags, Exeter, Devon ,01392 255202 - November has been a surprisingly excellent month for both exchanges and new sales. Lack of instructions into the new year will mean the number of sales will reduce and prices will therefore hold firm, and possibly increase slightly.

Richard Dolton FRICS, Richard Dolton Ltd., Torpoint, Cornwall ,01752 813813 - Slight urgency to complete before 31 December 2009 to avoid Stamp Duty alteration.

Michael Joyce MRICS, Cooper & Tanner, Frome, Somerset ,01373 455060 - Next year is going to be good. All the signs are positive, with the exception of any hidden problems in the banking sector. Expect the new owners of Northern Rock to be very aggressive in the mortgages market.

Matthew Harvey BSc MRICS, Chesterton Humberts, Cirencester, Oxfordshire ,01285 650955 - Stock levels remain critical factor. 2010 very difficult to predict.

Ian Perry FRICS, Perry Bishop & Chambers, Fairford, Nailsworth, Tetbury, Gloucestershire ,01285 655355 - As is usual we have sold more houses in October and November than any other time of the year.

Ian Perry FRICS, Perry Bishop & Chambers, Cirencester, Cheltenham, Gloucestershire ,01285 655355 - As is usual we have sold more houses in October and November than any other time of the year.

Ian Perry FRICS, Perry Bishop & Chambers, Malmesbury, Wiltshire ,01285 655355 - As is usual we have sold more houses in October and November than any other time of the year.

Timothy Garratt FRICS, Rendells, Chagford, Devon ,01647 432277 - Continuing good level of buyer enquiries for time of year and properties selling steadily.

Robert Williams MRICS, Robert Williams, Exeter, Devon ,01392 204800 - A surprisingly busy market for the time of year.

Robin Thomas FRICS, Strutt & Parker, Exeter, Devon ,01382 215631 - A shortage of quality country houses has resulted in the market firming up. We have seen the return of best offers, attempted gazumping and even a contract race.

Keith Metcalfe FRICS, Metcalfe's, Torquay, Devon ,01803 298481 - The market has been busier and there has been an increase in confidence generally. New instructions seem to create interest from waiting buyers. In many cases prices achieved are close to asking prices.

Peter Farnsworth FRICS, Rendells, Exeter, Devon ,01392 276 404 - Lack of instructions has led to a temporary increase on prices, but will cause the market to be very flat in the first quarter of 2010.

Roger Punch FRICS, Stags, Plymouth, Devon ,01752 223933 - Poor supply of fresh property instructions remains the dominant feature of the market. Those who decide to place their properties on the market over the Christmas and new year period may be pleasantly surprised by the volume of excellent purchasers available!

Julian Bunkall FRICS Jackson-Stops & Staff Dorchester, Dorset 01305 262 123 Despite the time of year, November has been an encouraging one for sales although new instructions have been quieter. We anticipate the next two months to be quieter for sales but hopefully instructions will pick up in the new year although the onset of a general election may create uncertainty.

Wales

William Leschallas MRICS, Jackson-Stops & Staff, Burford, Oxfordshire ,01993 822661 - Although the market has been busier over the last few months, I still believe the next year will be difficult. The press continue to mix up price with the market. Price is good but it is not as important as the market which is vital.

John Caines FRICS, Payton Jewell Caines, Bridgend, Wales ,01656 654328 - There is more activity in the market although it is starting to slow which may be seasonal.

Paul Lucas BSc FRICS, R K Lucas & Son, Haverfordwest, Pembrokeshire ,01437 762538 - Property market activity is improving significantly in the lower to mid range brackets, although there remains some uncertainty in the minds of both buyers and sellers as to how residential transactions will pan out.

John Nicholas MRICS, J J Morris, Haverfordwest, Pembrokeshire ,01437 769440 - Again very comparable to last month with no major factors influencing the confidence in the

housing market. Vendors appear to be more realistic with an increased number of properties coming onto the market at adjusted values. With Christmas fast approaching we assume that the housing market will be quieter than previous months.

Robert Wilkins MRICS, Newland Rennie Wilkins, Newport, Wales ,01633 221441 - The market is nothing like as strong, locally in the Newport area, as the media would have you believe. Caution and sensible pricing is still necessary in order to achieve sales.

D E Baker FRICS, David Baker & Company, Penarth, Vale of Glamorgan ,029 2070 2622 - Not as active in November as October. Lack of first time buyers and this is making it difficult to sell flats and to move the property market forward in a more positive way. Next 2 months will be very quiet.

Andrew Morgan FRICS, Morgan & Davies, Lampeter, Ceredigion ,01570 423623 - Quieter than usual at this time of the year. We do not, based on current levels of activity, see any improvement likely until the spring.

Nicholas Hill FRICS, Newland Rennie Wilkins, Chepstow, Monmouthshire ,01291 626775 - The past few months have shown considerable improvement in activity with an increase in sales achieved, notably where vendors are prepared to negotiate to more sensible levels. Naturally we expect the usual seasonal downturn over the Xmas period but anticipate a more optimistic start to the new year.

Kelvin Francis FRICS, Kelvin Francis & Co., Cardiff, South Glamorgan ,029 2076 6538 - There is still a steady flow of buyers coming onto the market, even though usually, seasonally, we are coming up to the quietest time of the year. Vendors are tending to hold back until January, to put their properties on the market, which is exacerbating a shortage of traditional semi-detached houses, which are still greatly in demand.

David Jones BSc FRICS, Jones & Redfearn, Rhyl, Co Denbighshire ,01745 351111 - The market has shown signs of

improvement although this is now masked by the 'seasonal slowdown'. 2010 should see transaction levels increase but not prices.

Roger Davies MRICS, J J Morris, Cardigan, Ceredigion ,01239 612 343 - A little bit of "hibernation mentality" as Xmas approaches, mainly from vendors holding off going to the market until 2010. Some buyers still trying to move before the holiday and some trying to save stamp duty but legal matters appear to be more drawn out.

London

James Gubbins MRICS, Dauntons, Pimlico, Westminster ,020 7834 8000 - Buyer interest remains strong and stock levels low. We expect this interest to tail off as we approach the Christmas period and indeed it is beginning to do this already at the beginning of November, which is a good 5/6 weeks early for us here in central London. The lack of stock does contribute to this though with a number of buyers putting off any home searching until the new year when they hope more property will appear on the market. That would be nice.

Brendon Thomas MRICS, Maitlands Acorn Professional Ltd, London, Tower Hamlets ,8456344187 - General shortage of stock. Large bonuses to financial workers is likely to increase demand in Canary Wharf & the City.

Luke Pender-Cudlip MRICS, Knight Frank, London, Wandsworth and Clapham ,020 8682 7777 - The central London residential market has seen a steady improvement in recent months. The number of buyers active in the market rose 27% in June on a year-on-year basis, and the volume of sales rose by 40% over the same period. Purely in terms of activity, there is no question that the central London market is unrecognisable from where it was even six months ago. Falls in capital values, cheap debt and the weak pound have all encouraged buyers back into the market, with many keen to get on with their lives having put financial decisions on hold for the duration of 2008 and early 2009.

James Perris MRICS, De Villiers Surveyors, London, Central London ,020 7887 6009 - A continued shortage of good quality stock in the prime areas is forcing buyers to pay premiums resulting in an increase in house prices. Buyers perception of a long term low interest rate environment and more upbeat opinions on the state of the economy is likely to result in this trend continuing in the short term.

Matthew Lodge MRICS, Drivers Jonas LLP, London, City of London ,020 7896 7924 - We are still seeing some positive movement but at a marginally reduced rate that may be seasonal. Demand continues to outstrip supply. Outlook is one of cautious optimism although potential negative triggers in the wider economy are still of concern. Basic property fundamentals of quality of product and quality of location are being emphasised under current conditions.

Benson Beard MRICS, Bective Leslie Marsh, London, London ,020 7589 6677 - 2009 will go down as a year of extremes. We started in despair, wondering where the next buyer might appear from. With no confidence or readily available finance transactions were well down. As the weather warmed so did the (central London) market. Buyers were and still are competing for too few properties, especially houses, resulting in significant price rises. Another 'bubble' is being created and unless more property comes to the market in the new year we will hear another loud 'pop'.

Justin Knight MRICS, Bective Leslie Marsh, Brook Green, London ,020 7603 5181 - Further to a spike in the market from August to October the market appears to be slowing down through November, however, prices are remaining stable and in some cases bidding is fierce. Property in a 'ready to go' condition is attracting the hottest bidding, while those properties that would need refurbishment are much tougher to sell even at significantly reduced levels.

Stephen Whitley FRICS, R Whitley & Co., West Drayton, Middlesex ,01895 442711 - This month has seen an increase in genuine applicants wishing to purchase resulting in a larger volume of sales.

James Wilson DipSurv MRICS FCI Arb, W A Ellis, Knightsbridge & Belgravia (Flats), London ,020 7581 7654 - Very little stock and increased demand shows prices increasing again for blue chip flats. This trend is set to stay the same for some months.

James Wilson DipSurv MRICS FCI Arb, W A Ellis, Knightsbridge & Belgravia, London ,020 7581 7654 - Still very low on stock and either as a

consequence, or more likely due to the time of year, applicant registration has also dropped quite substantially.

Andrew Stanford BSc MRICS, Cluttons, St Johns Wood, London ,020 7647 7201 - Still a shortage of supply - low interest rates contributing to this factor and a continued degree of uncertainty in the economy. Finding most vendors are moving only if they have to. Applicant registration has soared in the last few months and remains consistent.

Andrew Stanford BSc MRICS, Cluttons, Battersea, London ,020 7647 7201 - Affordability - positive. Job insecurity - negative.

Jeremy Leaf BSc FRICS, Jeremy Leaf & Co., Finchley, Barnet ,020 8446 4295 - The continuing shortage of instructions is still underpinning price rises. As a result, buyers who are not dependant on the arrangement of mortgages, which remains difficult to obtain for all but the most financially secure, are at a distinct advantage. However, there is a finite number of these buyers so there is a real risk that, if their requirements are not satisfied, the recent modest increase in market activity will run out of steam.

Keith Barnfield FRICS, Barnfields, Enfield, Middlesex ,020 8363 3394 - The market is quieter for the usual seasonal reasons but sensibly priced properties are continuing to attract buyers.

John King MRICS, Quinton Scott, Wimbledon, London ,020 8971 6780 - The high level of buyer enquiries covering a wide price range has increased sale activity only held back by the lack of stock. Nevertheless if the property is over-valued it won't sell, unless something special.

Kim Turner, Bective Leslie Marsh, Kensington, London ,020 7795 4288 - November saw significant activity in the Kensington sales market with buyers actively looking to agree a sale with a pre-Christmas exchange. As a result stock levels are starting to deplete as the number of new instructions coming to the market are very low particularly as we enter the Christmas period.

Luke Pender-Cudlip MRICS, Knight Frank, Wandsworth/Balham/Clapham, London ,020 8682 7777 - It would be wrong to expect a rapid recovery in the housing market, the economy is not in a position to permit this in the short term. Similarly, it would be wrong to expect carnage. Real demand is strong, supply in the wider market and the new-build sector is very low and we are unlikely to see a rapid shift away from a low interest rate environment. In short, probably a plateau in market conditions for the foreseeable future.

Gary French BSc Dip FRICS, Friend & Falcke, Central London, London ,020 7225 0380 - The Xmas break having the usual slowing impact on the market.

Scotland

Lindsay S. Duguid BSc FRICS, McNeill Maguire & McCreath, Edinburgh, Lothian ,0131 226 6518 - Quiet market conditions due to the state of the market, time of year and shelf life of the Home Report.

Chris Hall MRICS, REttie and Co, Edinburgh, Midlothian ,0131 624 4074 - Supply of new instructions to sell remains constrained and consequently the demand for those properties on market is stronger. Over last 3 months there has been a noticeable improvement in market sentiment north of £800,000 with buyers returning in this sector and a number of private sales occurring - these had disappeared for previous 18 months or so.

Paul Taylor MRICS, J & E Shepherd, Dundee, Tayside ,01382 200454 - Significant slow down of Home Report instructions since end of October - likely to continue through into new year.

Alasdair Seaton BSc MRICS, D M Hall, Dunfermline and Environs, Scotland - Properties still selling. Listings still sluggish. Agents priority is to build stock over the next month with a view to the new year.

Alasdair Seaton BSc MRICS, D M Hall, Kinross, Scotland ,01383 621262 - Properties still selling. Listings still sluggish. Agents priority is to build stock over the next month with a view to the new year.

Grant Robertson MRICS, Allied Surveyors, Glasgow, Scotland ,0141 330 9950 - Values are remaining consistent but this is driven by the low levels of existing stock and incredibly low levels of take-up in November so far. Owners appear now to have settled for staying put until next year. A long cold dark quiet winter lies in front of us.

John Bradburne FRICS, Bradburne & Co., St Andrews, Scotland ,01334 479 479 - Very little to report at this traditionally inactive time of the year. There is, however, some confidence that things will change for the better in 2010.

Alexander Inglis BA MRICS, C/TD Galbraith, Scottish Borders, Scotland ,01896 754842 - The market now seems to have slowed down in the run up to Christmas but those who are looking seem serious and we have had a few good sales of properties - some of which have been on the market for some time. There seems to be an expectation that things will improve next year - possibly following the election.

Chris Highton Dip Surv FRICS, Allied Surveyors, Selkirk, Scottish Borders ,01750 724170 - The seasonal downturn of properties onto the market has come earlier this year. There is, however, evidence of purchasers remaining active, and this in turn should lead to a little more supply. Prices are generally holding steady. Cautious optimism!!

Richard A Clowes MRICS, DMHall LLP, Galashiels, Scottish Borders ,01896 752009 - As we approach a quieter time of year generally, we are seeing slightly fewer home report instructions but are aware of a greater number of house sales taking place. Values remain static but we are seeing more remortgage business coming through.

Northern Ireland

Bronagh Boyd MRICS, Digney Boyd, Newry, down ,028 30833233 - Increased demand from first time buyers and investors. People realistically pricing their properties. 2010 to show signs of improved lending and more liquidity in the market place.

Philip Tweedie BSc (Hons) MRICS, Philip Tweedie & Company, Coleraine, Londonderry ,028 703 44433 - Mortgage availability - mortgages are more becoming easier to obtain.

Aidan Conway MRICS, P Andrews
Chartered Surveyors, Londonderry,
Londonderry ,2871263635 - Demand
from first time buyers has continued
to increase over the last 3 month
period although availability of
mortgage finance is still limited.
Demand will usually reduce over the
Christmas period with renewed
interest anticipated by February
2010.

Tom McClelland FRICS, McClelland
Salter, Lisburn, County Antrim ,028
92674121 - There are clear
indications of price stability and we
have negotiated some strong sales.
There are concerns about public
spending cuts that still have to be
made. Stamp duty holiday finishes in
December and this will probably
dampen 1st time buyer activity in the
early new year. 2009 has been much
better than 2008.

Harold Montgomery FRICS,
Montgomery Finlay & Co.,
Enniskillen, Co Fermanagh ,028
6632 4485 - Negative: Bank lending
and insecurity in economy. Positive:
Interest rates and general UK
market upturn. Things are looking up
rather than down.

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