

London Edition

Little Blue Book

Your property market insights for 2019/20

rightmove 

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Helping you plan for success in 2020



Miles Shippide MRICS

Commercial Director,
Rightmove

Welcome to the latest edition of Rightmove's Little Blue Book, packed full of property data, trends and analysis.

I've seen lots of change in market conditions and the industry since I started in estate agency in 1978. While some more recent elements seem rather fast and furious, the need for housing and helping people with it remain relatively constant.

In this book you'll find a combination of Rightmove's extensive consumer reach and unrivalled data, plus key facts from government and industry bodies.

To keep up to date and stay ahead of the competition throughout the year, you can also access Rightmove's other resources. This includes the new and improved Rightmove Hub, an extensive training resource designed to cater for all levels, from new starters to partners and directors. There's also the monthly House Price Index, plus your local area competitive landscape provided in the Market Share Reports in Rightmove Plus.

As 2020 marks 20 years since Rightmove's launch, we've also taken the opportunity to look back at the last 20 years in property. The industry has withstood some major changes in that time and shown incredible resilience - adapting to new tech, legislation and a variety of market conditions. We'll look back at some of the key milestones since 2000 and what the future might hold.

With knowledge comes trust, which all studies of our industry say is a vital factor in attracting new customers and maximising on existing business. We hope you'll find the right balance of valuable facts to ensure you and your teams can communicate to your existing and potential customers with confidence and authority, to take advantage of the opportunities in the year ahead.

Sales

The percentage of owner-occupiers with a mortgage has dropped from 60% in 2000 to 47%. The overall number of owner-occupiers has only grown 3.1% in the same time.

Source: Ministry of Housing, Communities & Local Government – England – 2000 vs 2018

New instructions

Nationally, we've seen new listings down 6.3% in the first three quarters of 2019, compared to the same time last year when new listing numbers reached their highest point since 2014.

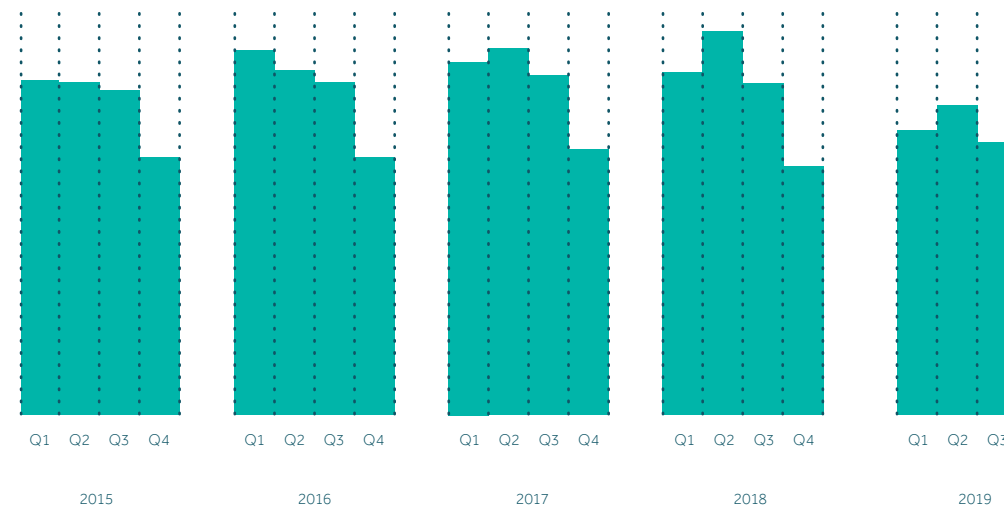
In London, the drop has been more exaggerated where some property owners can afford to wait, hoping for a better time to sell.

Various factors are at play including ongoing political uncertainty, combined with the costs of moving and a lack of suitable property to move to.

New listings YOY change by region / country:

East Midlands	-3.0%
East of England	-6.3%
London	-18.1%
North East	-3.7%
North West	-3.4%
Scotland	-2.7%
South East	-7.1%
South West	-5.1%
Wales	-4.7%
West Midlands	-1.2%
Yorkshire and The Humber	-2.1%

New listings on Rightmove in London by quarter



Source: Rightmove data October 2019. Year on year change Jan – Sep 2018 vs 2019

New seller asking prices

At the start of 2019, new seller asking prices in London were down 2.4% year on year, however moving into Q3 we've seen an improving trend.

The peak for asking prices in London came in Q2 2016 when new sellers were asking for an average of £641,754. The average new seller asking price in London for Q3 2019 is £27,232 below those levels.

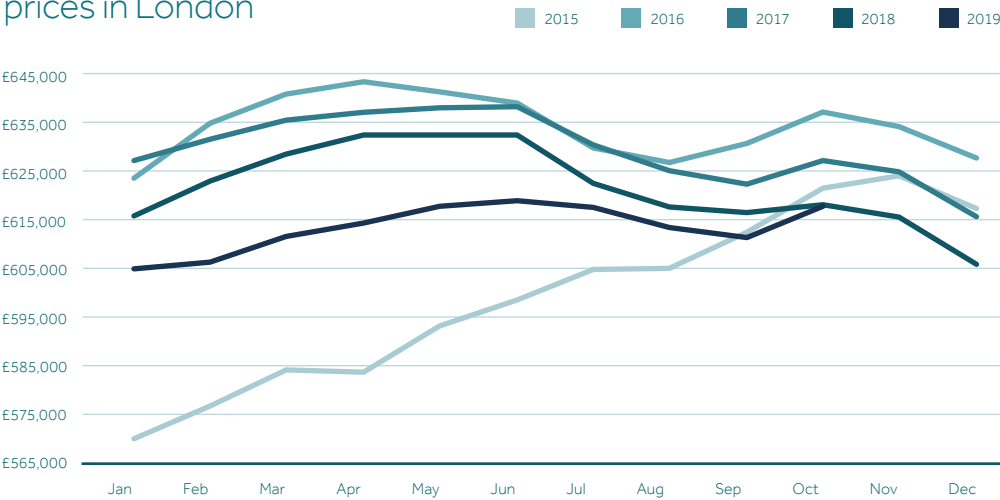
Political uncertainty and sellers waiting for market recovery will have contributed to this.

Average new seller asking prices in London YOY comparison Q1-Q3:

	2018	2019	YOY
Q1	£622,899	£607,957	-2.4%
Q2	£633,090	£617,632	-2.4%
Q3	£619,325	£614,522	-0.8%

Turn to page 45 for more local insights and see Rightmove's monthly House Price Index online.

Average new seller asking prices in London



Affordability ratio

To work out how affordable it is to buy property, we divide the average new seller asking price by the average annual income, giving us an affordability score. The lower the resulting number, the more affordable it is to buy property.

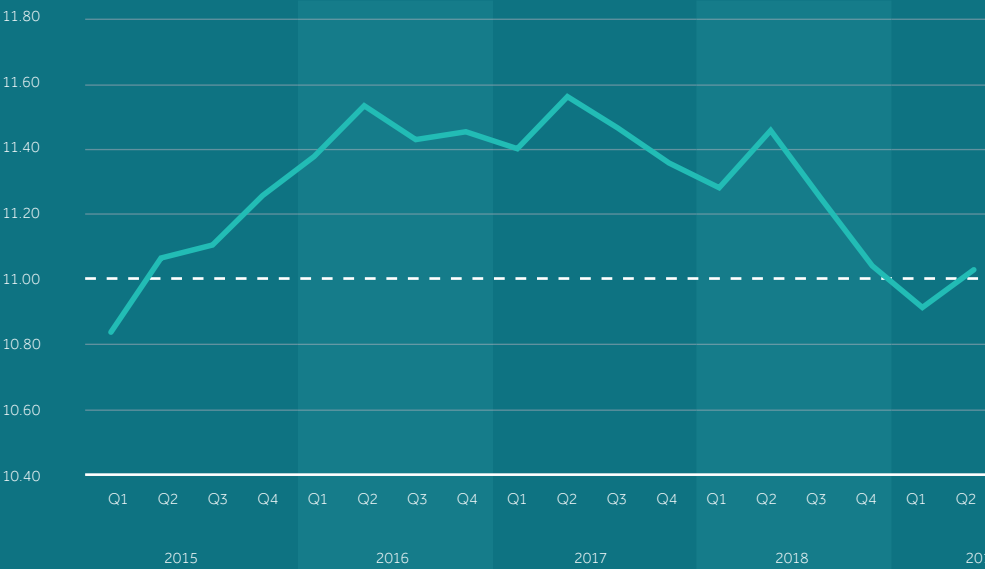
From 2015 to 2017, new seller asking prices increased at a faster rate than the average income, causing the affordability ratio to increase, reaching its peak in July 2017.

Since the latter part of 2017, the affordability ratio has been reducing as wage growth has outstripped the increase in average asking prices. In the first half of 2019, wage growth remained strong, up 3.5% compared to 2018¹ whilst new seller asking prices have remained static.

In Q1 2019 the affordability ratio recorded its lowest figure for four years, just above the previous low point of Q1 2015, making the first half of 2019 the most affordable since 2015.

Affordability ratio nationally

(average new seller asking price divided by average annual income)²



Property price reductions

When looking at reductions there are two key factors at play – the number of properties that have been reduced and the amount they have been reduced by.

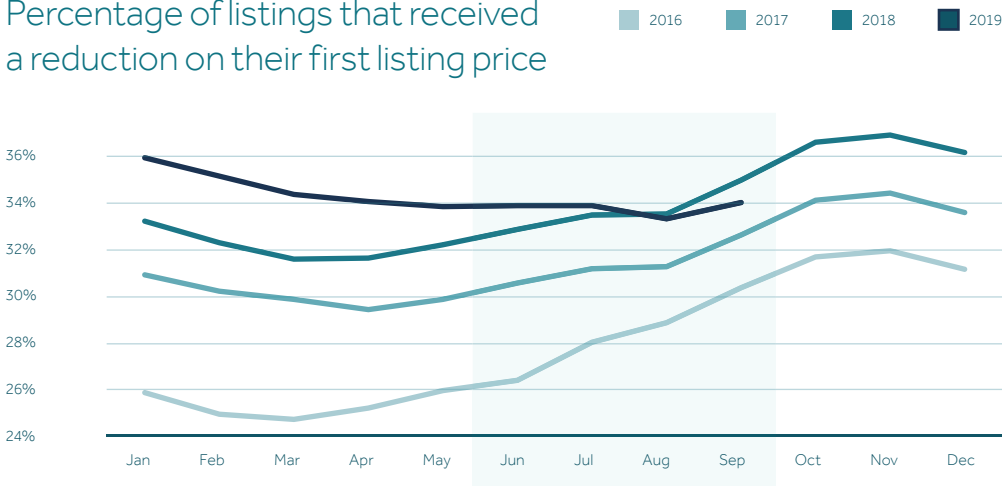
On average, 34.3% of properties have received a price reduction so far this year, up on the 32.9% across the same period last year. The average size of reduction from first to last listing price so far this year has been 6.0%, similar to last year's 5.9%.

Usually after the spring market, we see more properties being reduced and by a higher amount, but this year we've seen the size of reductions and the number of properties being reduced remain flat.

Could this be a sign that more sellers are taking their agent's advice and recognising the need to be more price sensitive from the outset in the current climate? Perhaps, as the time to secure a buyer usually increases post-Spring, but this year has seen an unseasonal plateau across the summer.

Use the Best Price Guide in Rightmove Plus to back up a realistic price from the outset. Highlight recent comparable sales and lets, as well as properties stuck on the market

Percentage of listings that received a reduction on their first listing price



Sales agreed and transactions

The need or want for more space, a new place for a new job, or the other usual life moves, have helped sales agreed remain relatively steady (-3.1%)¹ despite the backdrop of uncertainty in the first three quarters of 2019, compared to the same period last year.

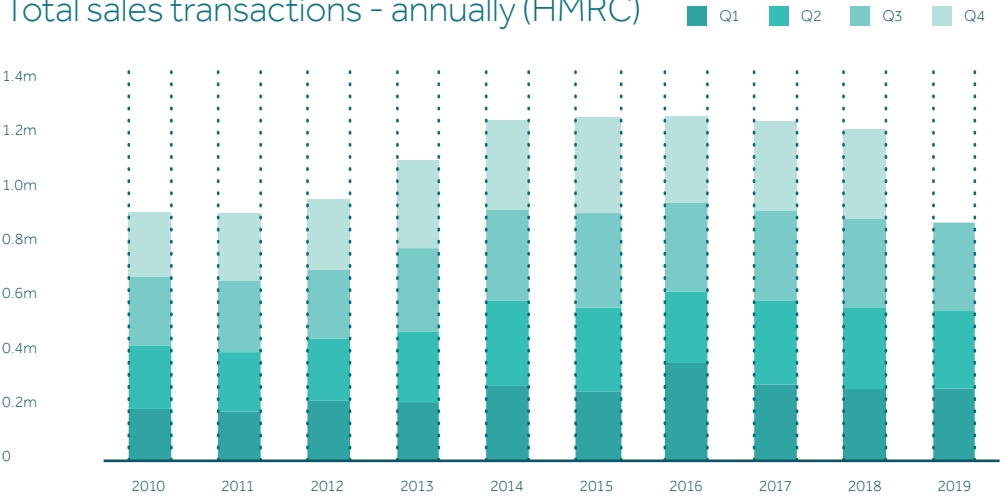
The strongest areas were Scotland and the North East where sales agreed increased 3.7% and 2.1% respectively. The South West saw the greatest reduction in sales agreed at -5.8%.

Sales agreed are a good indicator of future transactions, and over the past few months have improved slightly.

Sales agreed change YOY by region / country¹:

East Midlands	-3.6%
East of England	-4.6%
London	-3.8%
North East	2.1%
North West	-3.1%
Scotland	3.7%
South East	-4.5%
South West	-5.8%
Wales	-1.2%
West Midlands	-4.6%
Yorkshire and The Humber	-1.2%

Total sales transactions - annually (HMRC)

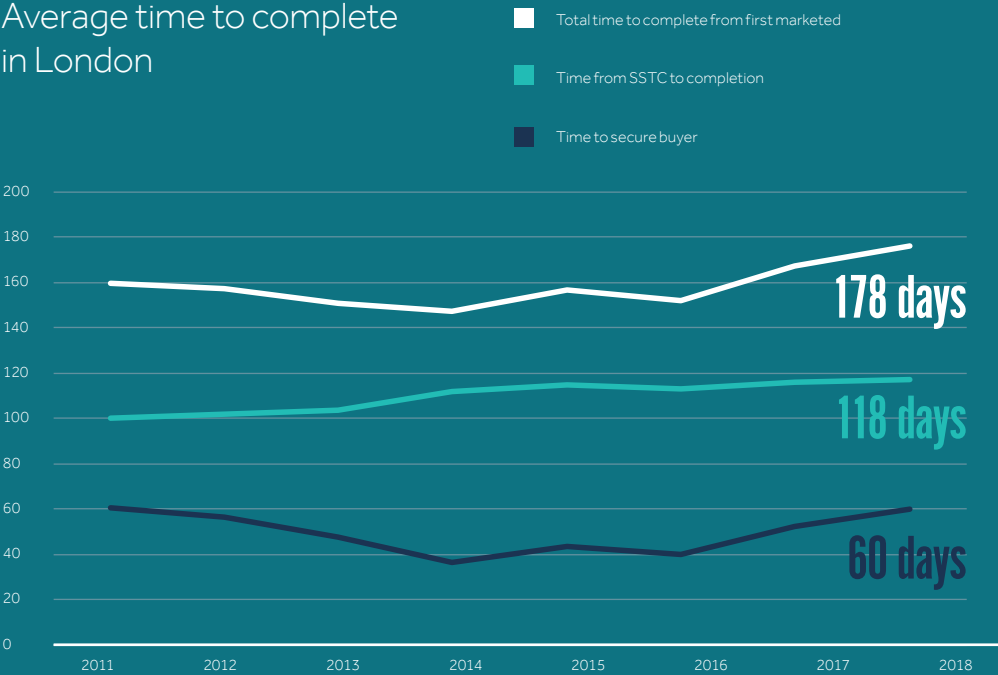


Time to complete a sale

In London, it takes on average 178 days for a property to move from first marketed through to completion; that's 22 days more than the average across Britain and 11 days more than the rest of South England.

Both the time to secure a buyer and time from SSTC to completion have contributed to this increase so there's plenty of room for improvement.

Average time to complete in London

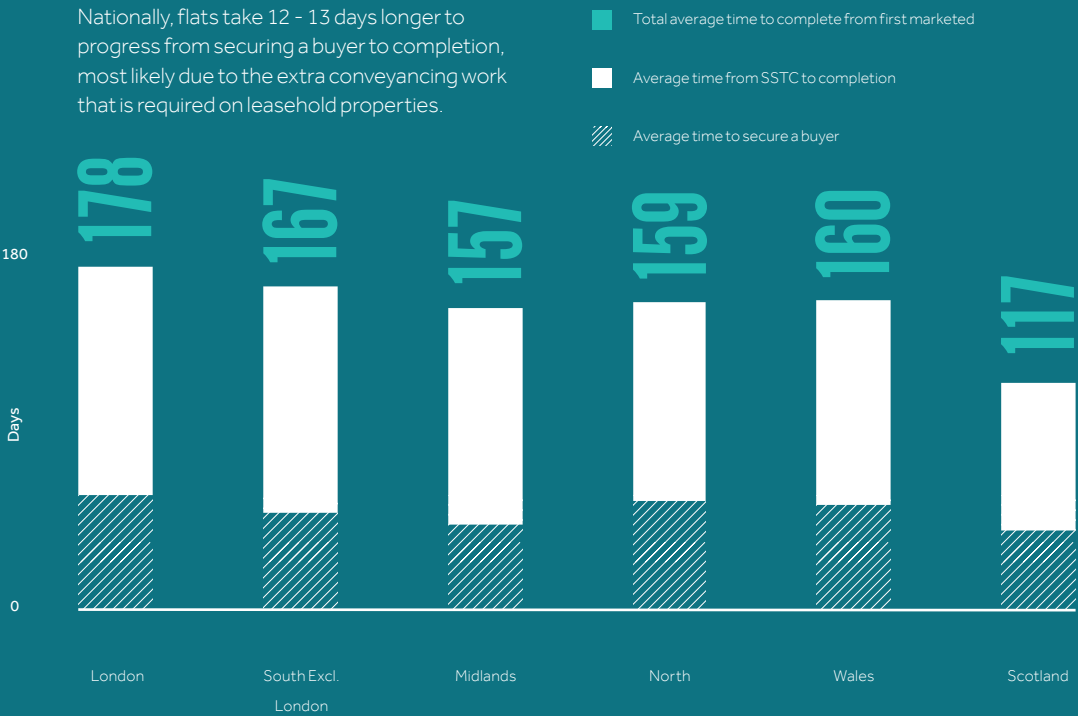


In London it now takes on average **60 days** to secure a buyer and a further **118 days** to progress that buyer to completion

Ensuring every property is correctly priced and presented well with images and floorplans from day one can help you secure a buyer quicker, but how can you get those sales through to completion faster?

Turn to pages 10 and 11 for tips to speed up your transaction times

Nationally, flats take 12 - 13 days longer to progress from securing a buyer to completion, most likely due to the extra conveyancing work that is required on leasehold properties.



Guest article: Pushing sales through to completion faster



Peter Ambrose

Managing Director,
The Partnership

"With deals now taking 15 weeks on average to go through the conveyancing process, it's vital you do everything possible to avoid those deal-killing delays."

Here are three tried and tested steps you can follow to speed up your transaction time:

1 Identify potential ownership issues with the property

You can buy the title plan from Land Registry to check your client owns what they think they do. Some areas to look out for are gardens, roof terraces and attics. Resolving problems with ownership, especially with leasehold properties, can take months to resolve, so getting the seller to do this in advance can be a huge time saving.

2 Check all the key aspects of the lease

Look beyond just the lease term, in particular, the demise – ie, does the lease plan match the Land Registry plan? Whilst every lease should have a plan, these can be missing or inaccurate – if so, ask your client to get a new one drawn up.

3 Get all documentation in advance

If there are alterations to the property, make your clients aware they will need guarantees and certificates and to give them to their lawyers early on. They will also need to get identification documents for themselves and anyone giving them money, such as the Bank of Mum and Dad, that will need to be certified, so ensure they do this in advance.

Visit hub.rightmove.co.uk and search "Peter Ambrose" to see his sales progression webinar

Agent's view: How we're speeding up sales to get the money in sooner



Simon Wilkinson

Senior Partner,
The Wilkinson Partnership
Beds and Bucks

For many agents cashflow and commission are fundamental to their business. The time from reserving a sale and receiving the money in the bank is critical and much can be done to enhance this – but what?

This year we've been trialling a way to provide buyers and sellers with more information upfront using documents from Propertymark, including a Property Information Questionnaire (PIQ) and a more extensive Memorandum of Sale (MOS).

The PIQ ensures the property is prepared for both marketing and for legal sale. The seller can complete the form online, or with the valuer who can help identify the things that need to be done to make the property 'sale ready'.

The completed form is emailed to the seller's conveyancer and they can immediately start to rectify the non-compliances to try and avoid delays later in the process, when a sale is agreed.

The buyers also complete a Declaration of Offer Form and a Chain Form, documents that we've been using for 20 years, which are sent to both conveyancers to help add certainty. Combined, these have helped lead to a fall through rate for our brand of less than 10%.

The new full MOS cuts delays too, not least through very simple things like getting the buyer's full name, correctly spelt (checked against their ID) and sending out the Land Registry Title documents and Plan (cost £3).

"Since trialling these extra steps, our average time from reservation to completion has dropped to nine weeks; six weeks faster than the national average. You can expect a lot more innovation very soon, and with it, happier buyers, vendors and agents."

Make the most of your Rightmove membership

As a Rightmove member you have exclusive access to a wide range of tools and reports in Rightmove Plus to help you...

Uncover hidden instruction opportunities

Use the Lead Report to quickly identify buyers who also have a property to sell and are in your patch. Regularly revisit your Lead Report to check everyone has been contacted.

Turn valuations into instructions



Use the Market Share Reports to prove your credibility by printing off a market share certificate. Show you're a leading agent for sales/let agreed, new instructions or available stock.

Create evidence backed valuation reports quickly

Did you know, if you price a property correctly from day one, you're 40% more likely to be the agent that sells it?

With the new and improved Best Price Guide you can create personalised valuation reports, combat over-pricing and demonstrate your proven experience at selling or letting similar properties.

Keep hold of stock



Use the Marketing Report to showcase the impact of your marketing efforts. You can send vendors a personalised report in just a few clicks.

Get more interest in every property



Use the Property Performance Report to quickly spot properties that are missing key information or need refreshing.

Get the edge with exclusive online training

"The Rightmove Hub has proven very beneficial, helping me expand my knowledge and skills throughout different areas of estate agency."

From using Rightmove tools to generate more business, to live training webinars, I feel it has kept me ahead of my competition in a tough market"

- Simon Gates, Michael Graham



Live webinars with Q&A



100's of industry focused videos



CPD accredited by NAEA and ARLA



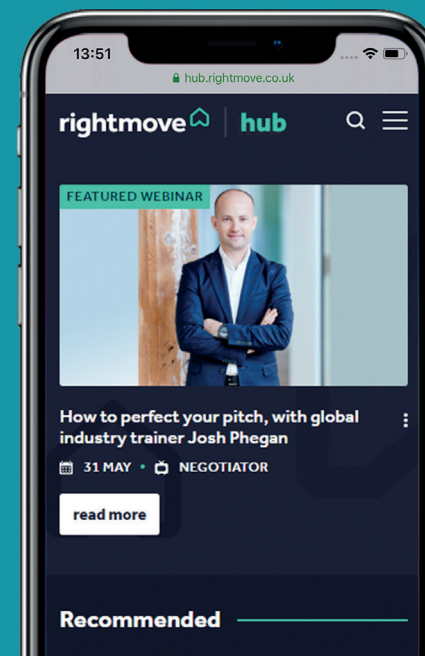
Interviews with industry insiders



Keep up to date with the latest legislation



Job role specific channels



Under the spotlight: Rightmove webinars

"Webinars are a fantastic resource where agents can get involved by voting on polls and asking questions of the speakers, plus it counts towards your informal CPD. Each month we invite in guests to share their unique expertise on a range of topics, including top picks such as legislative changes, photography tips, marketing insights and ways to win more business"

Lisa Gray, Webinar Co-ordinator, Rightmove.

Visit hub.rightmove.co.uk

Buyer insights

We surveyed people saying they were planning to buy in the next 12 months to get a snapshot of what the current active buyer market looks like.



29% of buyers are buying for the first time¹



1/5 buyers are buying for the second time¹



42% are buying for the third time or more¹



1/4 of buyers have lived in their current home for less than five years²



15 years - the average time a buyer has lived in their current home²



9% of buyers are buying a home they don't plan to live in¹

Tenant insights

Could your current tenant be a future buyer? We asked people saying they're currently renting about their home moving ambitions.



49% of tenants have been in their property over two years¹



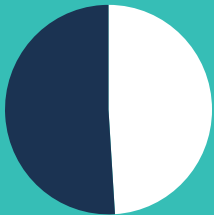
25 months - the average time tenants expect to stay in a rented property¹



1/2 of tenants would like to buy but can't afford to¹



1/3 of tenants have previously owned a property¹



49% of tenants think rents are going up in the next year¹ (37% in London²)



2/3 of tenants would consider renting in an area before they buy¹ (28% for buyers³)

Lettings

The percentage of households renting has grown from 29% in 2000 to 36%. Over half of tenants now rent privately compared to 2000 when two thirds of tenants were social renters.

Source: Ministry of Housing, Communities & Local Government – England – 2000 vs 2018

Available stock

Since 2016, landlords have seen the introduction of a stamp duty surcharge on second homes, a phasing of the reduction in tax relief and more recently the ban on tenant fees.

There was a short-term flood of rental properties throughout 2016 and into 2017 caused by landlords who bought before the stamp duty surcharge came in, but that stock has now dissipated and in Q3 it was 25.5% lower in London than Q3 2015 before any of these changes came in.

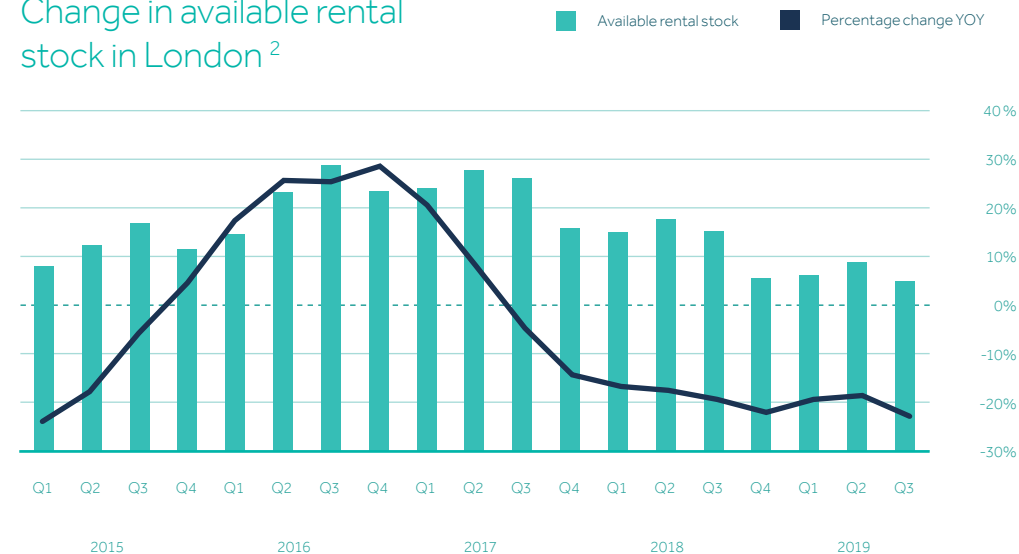
Despite all of these challenges, 58% of landlords say they plan to retain or increase the number of rental properties they own.

Of the remainder, 24% said they'll sell some or all of their rental properties and 18% hadn't yet made any future plans¹.

This presents an opportunity for letting agents to support landlords as they navigate the ongoing changes. Turn to page 15 for tenant insights you can share with your landlords.

Search "landlords" on hub.rightmove.co.uk to see the latest tools to help you attract new landlords

Change in available rental stock in London ²



¹ Rightmove consumer survey July 2019. Sample of 2049 private renters. ² Rightmove data October 2019.

Asking rents

In London, the average new rental asking price is up 5.6% in Q3 2019 compared to the same period last year.

Nationally, the increase in asking rents has been less steep, averaging 3.2%.

The rise in asking rents has been most noticeable following the introduction of the Tenant Fees Act at the start of June, with rents continuing to grow over the summer months.

Demand has remained strong in London. We have seen a short-term increase in demand over the summer months as some tenants waited to take advantage of the removal of admin fees.

On the other hand, tenants who are looking to rent for a longer-term may choose to stay in their existing accommodation to avoid rent increases imposed by new tenancies.



Turn to page 45 to see asking rent and new listing trends for your borough

Average asking rent in London per calendar month



Regional rent increases

Rents have risen steadily over the last few years. Almost half (49%) of tenants expect this trend to continue over the next 12 months, whilst more than a third (37%) expect rents to remain stable or reduce, potentially indicating less scope or acceptance of future rent rises with some tenants.

Turn to page 15 for more tenant insights.



¹Rightmove Rental Price Tracker October 2019. Average monthly asking rent for Q3 2018 vs 2019. ²Rightmove consumer survey July 2019. Sample size 2049 private renters.

Industry view: Getting ahead in lettings



David Cox

ARLA Propertymark,
Chief Executive

"Prepared agents will see their business flourish as they can prove their worth to their landlord."

The private rental sector is seeing some of its biggest changes in recent years, and the pressure is on for letting agents to adapt and keep aware of the future changes.

2020 will see tenant fees banned on all current tenancy agreements, not just new ones, so now is the time to prepare to offset lost income. Automated admin solutions, additional services charged to landlords and, in some areas, increasing rents can make up for these losses.

Mortgage Interest Relief (MIR) on rental properties will see its final phasing out and be cut to 0% from next tax year, meaning some landlords may sell up, raise rent or neglect maintenance duties to reduce costs. While we at ARLA continue to argue the benefits of MIR, agents can support and advise their landlords to ensure their properties remain viable sources of income and offer services that will prevent landlords leaving the market.

The Regulation of Property Agents (RoPA), rogue landlords and letting agents database, minimum EPC ratings, fire safety and electrical checks continue to be top priorities for the future too, agents need to ensure that their landlords are prepared for changes coming to the sector.

More than ever, the lettings industry is under scrutiny, but prepared agents will see their business flourish as they can prove their worth to their landlord.

Turn to page 41 to read more about the RoPA Working Group's report to government from Mark Hayward at NAEA Propertymark.

David regularly appears on Rightmove webinars. Visit hub.rightmove.co.uk and search "David Cox" to see his latest updates

Agent's view: Impact of the Tenant Fees Act



Cheryl Burn

Lettings Director,
The Personal Agent
Surrey

"Value for money is more important to our landlords than simply choosing an agent with the cheapest fee."

The idea of the ban, on the face of it, does make a little sense. It is true that some agents with a less long-term view of their business geared their model towards short term gain with high fees for tenants. As a result, those agents have seen their profits drop and are closing their doors.

The government hopes the ban will increase mobility within the private rental sector. Landlords are now facing additional costs in admin fees, referencing and Right to Rent checks, and as a result are claiming back their losses through increased rents, exactly as expected.

While the fee ban may have more of an upside in cities where people sharing houses or renting rooms commonly move home every six to twelve months, the dynamic in leafy Epsom is, overall, very different. Most of our tenants look for a property to settle

down in while they see their children through school but some are now being penalised in the long run through increased rents.

We decided the fairest and most sustainable course of action was a fractional increase of our landlord fees. We redesigned our management service to include more benefits, without charging extras for property inspections and contractor visits.

Our business is built on the principle of personal contact and professionalism. We provide our clients with regular newsletters and legislation updates to keep contact with them during the tenancy. This is what makes us stand out and has enabled our business to grow. This has validated our belief that value for money is more important to our landlords than simply choosing an agent with the cheapest fee.

New revenue and time-saving opportunities for letting agents

We've partnered with Van Mildert to help you increase revenue from landlords and reduce admin to work more cost effectively.



Rent Guarantee

Let Only landlords

A new revenue stream to help you earn more per lettings transaction

Earn commission by referring your Let Only landlords to Van Mildert for Landlord Protect Insurance.

Refer your landlords with **one click** using Van Mildert's integration with the most popular agency software providers.

Rent Collection

Rent Collect landlords

Differentiate your service to win and retain more landlords

Van Mildert **manages the rent collection** and pays it to you on the due date - even if the tenant is late paying.

If a tenant breaches their agreement, Van Mildert will also **cover up to £50k for the legal costs** of eviction.

Plus, if the property is damaged, they'll pay 50% of the rent for two months after vacant possession.

Portfolio Protect

Managed landlords

Step change in profit and ongoing revenue

Make your managed service offering **more premium** by wrapping in a rent guarantee and protection against eviction.

Bulk transfer all your existing managed landlords at once, insuring all existing tenancies – not just new ones.

Start with a free trial for you and your landlords whilst Van Mildert's team help you get business converted.



New revenue for you



Less admin, low effort

Van Mildert provide a range of solutions to help you support all your landlords, so you can offer an improved service for higher fees. Speak to your Rightmove Account Manager for full details.



Tenant Referencing

All landlords

Quick, easy, compliant referencing you can trust

Order references and track cases at the **touch of a button** from within your existing software

The "waiting approval" feature allows you to reject any tenant if you know they'll fail referencing, before you are charged.

You're never tied into a contract and you get a free one-month trial.

Rightmove Passport

All landlords

Save time registering applicants and pre-qualify tenants fast

Free tool available **exclusively for Rightmove agents** and tenants.

Pre-qualify tenants to **spot those who are proceedable**, saving you time on wasted viewings.

When a tenant completes the soft credit check and shares the PDF with you, you'll see the identity check, credit score and any CCJs.

Spot it:
Look for "Pre-qualified lettings enquiry" in the subject line of your lettings leads.

View it:
Access the basic passport on the link in the lead, or via your Lead Report in Rightmove Plus.

Request it:
Ask your applicants to create a passport at ready.rightmove.co.uk and send you the PDF.

Build to Rent key stats

As supply of rental properties has dropped year on year, demand for quality accommodation continues to grow. The Build to Rent sector presents an opportunity to balance the scales in the UK's major cities, where quality rental stock to suit "lifestyle renters" is at a premium.

Letting and managing these new institutional backed developments gives an opportunity for lettings agents.



Build to Rent sites Q2 2019 UK¹

■ Under construction	36,410
□ In planning	74,366
▨ Complete	32,223

> 1/2

Over half of all Build to Rent developments are located in London¹

£2.6b

In 2018, Build to Rent investment totalled £2.6 billion; an 11% increase from 2017²

Industry view: How Build to Rent supports housing delivery



Stephanie Pollitt

Assistant Director of Real Estate Policy,
British Property Federation

"The Build to Rent sector not only supports new housing delivery but also offers a unique opportunity for those people who want or need to rent."

The UK is suffering from an acute housing shortage, and the government has made clear its intentions to increase housing targets to 300,000 new homes each year. Housing of all tenures will have their role to play and the Build to Rent sector offers a unique opportunity to not only provide high quality rental homes for those who want or need to rent, but also to help support the delivery of new homes.

Local authorities across the country are beginning to recognise the sector's capacity to support them in boosting housing delivery. There are now 142,999 Build to Rent homes completed and in planning across the UK, an increase of 17% over the past year, with London accounting for 52% and the regions 48% of the total.

Leading the charge for innovations in the wider market such as fixed, longer term tenancies and index-linked rents, the sector is helping to provide more transparency and greater security for renters. Many also offer additional services such as gym memberships, broadband and a 24-hour concierge.

Dispelling the myth that it is a high-end niche product and with most providers in the sector aiming their product squarely at the mid market, Build to Rent is becoming increasingly accessible to a wide range of people and providing a high quality option in the UK's private rented sector.

New Homes

Over 3.1 million new homes have been built in England, Scotland and Wales since Rightmove launched in 2000.

Source: Ministry of Housing, Communities and Local Government 2000 - 2018.



Developer's view: The current new homes market

"Demand for new homes has remained high throughout 2019. Buyers are looking for exceptional quality, strong locations and fair prices. Low mortgage rates and the availability of Help to Buy have helped to underpin confidence in the market. New homes hold particularly strong appeal as buyers seek the convenience and reassurance of purchasing a home that will not require updating or upgrading - this is evidenced by our forward orders into 2020.

We find buyers visit us having researched the local market, current availability and with a firm understanding of their affordability levels. This educated buyer profile makes the journey smoother both for the customer and for us as a business"

Bellway

Industry view: Can we deliver 300k homes a year?



Stewart Baseley

Executive Chairman,
Home Builders Federation

The government's ambition of building 300,000 homes a year presents a huge challenge, but it is a deliverable objective. Huge progress has already been made, output has increased by an unprecedented 78% in the past five years and continues to grow.

"The ambition of home ownership remains strong. Whilst things have become more challenging in certain markets, demand for new homes has grown."

We also have widespread recognition of the need to build more homes and broad political support to do so. For this to continue, government bodies, house builders and lenders need to work closely together.

Help to Buy has been central to the increases in supply we have seen, and we are working to ensure products are in place for after its planned withdrawal in 2023.

A continued focus is needed to ensure that our workforce has the capacity and skills to deliver even more homes of the highest quality. We need to continue to work with the supply chain and push new technologies that will deliver further improvements in energy efficiency and build quality.

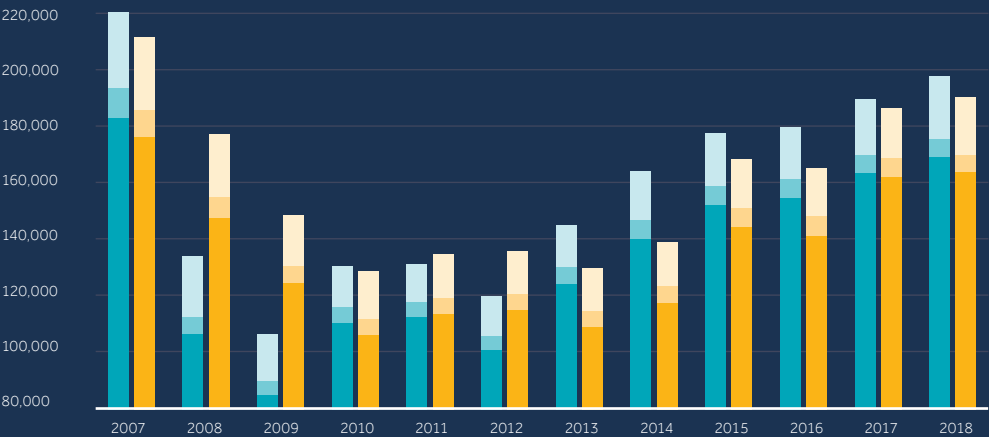
Starts and completions

New build starts and completions are at their highest point since 2007, with over 198,000 starts and 190,000 completions reported in 2018.

In 2018, new build starts were 51.2% higher than in 2010 when the sector began its recovery. England and Scotland made the largest contribution to this rise, with an increase of 53.5% and 54.5% respectively, whilst Wales remains stable with an increase of 1.0% in the same period.

Looking at completions, England leads the way with a 54.0% rise, with Scotland up 19.5% and Wales up 3.6% on 2010's levels.

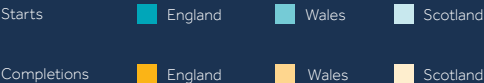
Starts and completions



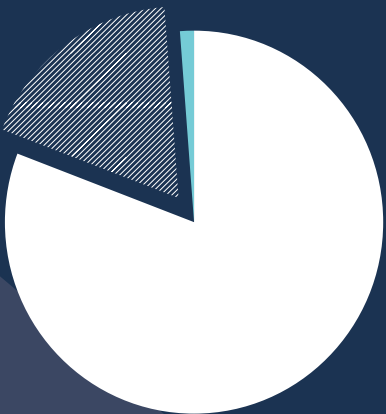
Total starts and completions in 2018:

	Starts	Completions
England	169,860	164,390
Wales	6,000	5,820
Scotland	22,260	20,250

Turn to page 25 to hear from Stewart Baseley where he answers the question "Can we deliver 300k homes a year?"



More recently, completions in England have risen 11.9% year on year in the first half of 2019, with 80.8% of all new build completions being delivered by private enterprises. Starts have dropped 10.7% in the same period.



Starts and completions YOY change (England):

	Starts	Completions
H1 2018	85,900	77,870
H1 2019	76,690	87,150
YOY change	-10.7%	11.9%

New build completions H1 2019 (England)¹

Private enterprise	70,440
Housing Associations	15,670
Local Authorities	1,040

Turn to page 24 to hear more about how the Build to Rent sector is contributing to home building targets.

18%

of all new build completions are delivered by Housing Associations¹

15%

of all new build stock on Rightmove is located in London²

¹Ministry of Housing, Communities and Local Government October 2019 - England
²Rightmove data September 2019, residential properties listed on Rightmove as new build.

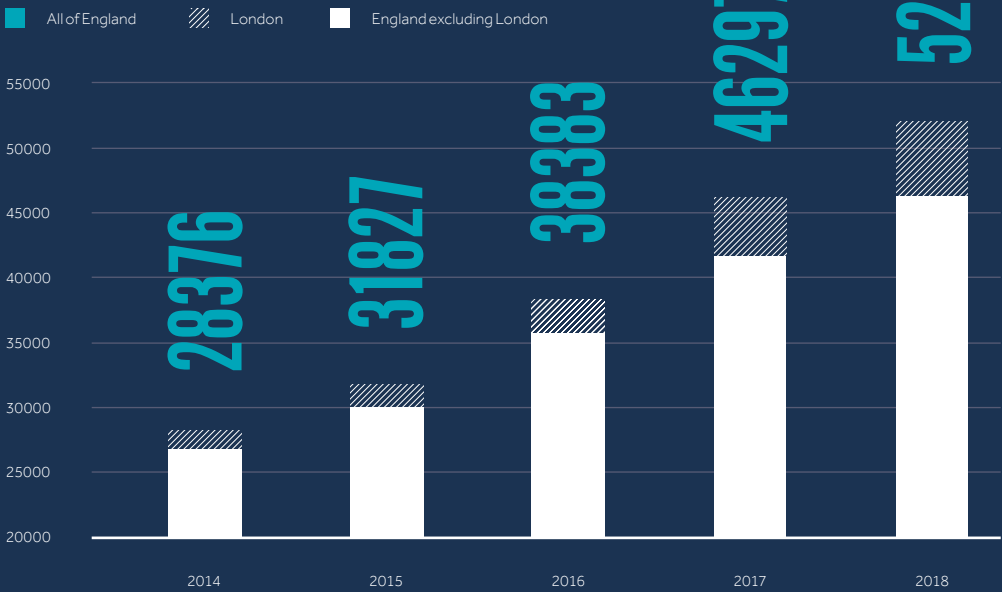
Help to Buy completions

Since the launch of Help to Buy in 2013, over 221,000 Help to Buy completions have been reported in England.

In 2018 there were 52,124 completions, 10.8% of which were in the capital. In the first quarter of 2019 Help to Buy completions rose 2.8% year on year across England, with a stark increase of 42.8% in London.

In Scotland and Wales the equivalent schemes reported 4,219 completions in 2018.

Help to Buy completions in England



Help to Buy purchase prices

The average purchase price for property sold under the Help to Buy equity scheme in London is £453,274.

96.2% of Help to Buy purchases in London are first-time buyers, with an average purchase price of £451,957.

For non-first-time buyers, the average Help to Buy purchase price is 8.1% higher at £488,590.

Average Help to Buy purchase price in 2018¹:

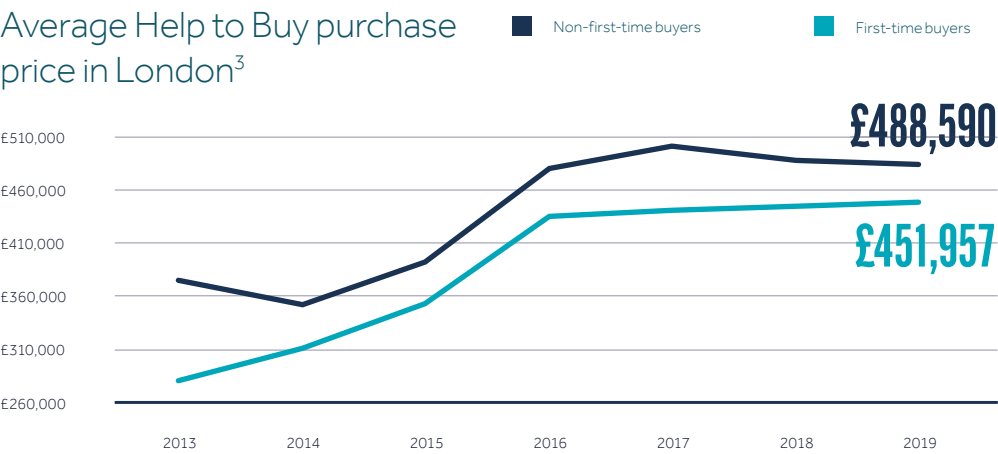
England:	£300,487
Scotland:	£172,000
Wales:	£200,878

The government plans to introduce a new version of Help to Buy in England from March 2021. The new scheme will be restricted to first-time buyers and will include lower regional caps outside of London.

England Help to Buy regional price caps from 2021²:

North East	£186,100
North West	£224,400
East Midlands	£261,900
West Midlands	£255,600
East of England	£407,400
London	£600,000
South East	£437,600
South West	£349,000
Yorkshire and The Humber	£228,100

Average Help to Buy purchase price in London³



Supply and demand

In London, 90.0% of new build stock is flats, however supply is outstripping demand as they only receive 80.4% of leads.

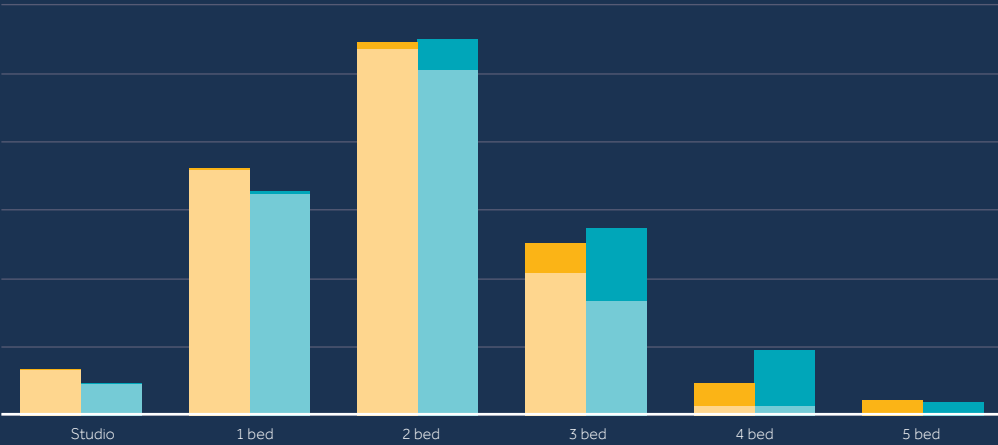
This imbalance is spread across all bedroom numbers, but is most noticeable for three-bedroom flats, accounting for 15.9% of stock compared to 12.8% of leads.

Looking at houses, supply of one, four and five beds meets demand. The biggest opportunity is for three-bedroom houses with demand far outstripping supply (17.6% of leads versus 8.0% of stock).

Build the right property types in the right locations with Rightmove's supply and demand report – speak to your Account Manager.



Supply vs demand by bedroom numbers in London



Market insights for new homes developers

With Rightmove you have access to a wide range of tools and reports to help you plan what to build, where to build it and how best to market your properties.

Available from your New Homes Account Manager:

Supply & Demand Report	Fair Share Report
Make data driven decisions around land acquisition, property specifications and pricing using Rightmove's demand, availability and pricing insights.	Discover how your Rightmove listings are performing compared to your competition to identify under-performing plots and developments early.
Buyer Insight Report	House Price Index
Find out where your enquiries are coming from, identifying new opportunities to target potential buyers more effectively.	The largest monthly sample of residential property prices sent straight to your inbox, on the third Monday of every month.

Insights at your fingertips with Rightmove Plus:

Property Performance Reports	Lead Reports
Quickly see how each of your plots is performing compared to similar properties and clearly identify how they can be improved, helping you sell your site faster.	Never miss a lead – all the emails and tracked calls for your development are listed in one place. Activate call recording to listen back to your calls to identify opportunities and deliver sales training.

20 years in property

As Rightmove reaches our 20th anniversary, we look back at the key milestones and changes our industry has faced since 2000, plus what's just around the corner.

Looking back at 20 years of evolution in property



Peter Brooks-Johnson

Chief Executive Officer,
Rightmove

It's hard to believe that 20 years have passed since Rightmove first launched. Which got us thinking – just how much has the world of property changed since then?

Looking at the housing market, we've witnessed numerous legislative changes, home buying schemes and stamp duty reforms, not to mention Housing Ministers.

Of course, we can't forget Lehman Brothers, Northern Rock and all the pain in our industry which followed in 2008. That I still see so many familiar customer faces from when I joined Rightmove in 2006 is testament to the resilience, adaptability, ambition and hard work of agents and developers.

Technological advances have had a huge impact on our industry. Agents and developers have learnt new skills and adapted to the demands put on them by consumers in an increasingly digital, fast paced world.

At Rightmove, we've grown from a small team of just 12, to over 500, spread across the length and breadth of Britain. The team work tirelessly to maintain and improve the site, build new tools and troubleshoot support issues to help agents and developers alike achieve your business goals.

In the next few pages we'll take a walk down memory lane, looking at some of the milestones in property over the last 20 years. We've also asked some industry leaders to share their experiences and what we might expect to see in the years to come.

	Then	Now
Average new seller asking price ¹	£130,306	£306,712
Percentage of households in rented property ²	29.4%	36.5%
Average income ³	£16,276	£27,742

¹Rightmove House Price Index October 2001 vs October 2019 ²Ministry of Housing, Communities & Local Government. 2000 vs 2018. ³ONS weekly wage report. 2000 vs Jan-June 2019

Timeline: 20 years in property

2000

Rightmove launched

2003

3G goes live in the United Kingdom

2006

Property sales transactions peak at 1.6 million²

2008

Credit crunch
Scotland: Home Reports launched

2012

4G goes live in the United Kingdom

2014

Stamp duty reform
slab structure scrapped

2016

3% stamp duty - surcharge on second homes

2018

Rightmove launches Tenant Passport (turn to page 23)

Average new seller asking prices peak at £309,439 (turn to page 4)⁵

2019

Tenant Fees Act is introduced (turn to page 21)

Average annual income peaks at £27,742⁶

2002

New Homes launched on Rightmove

2004

100m pages viewed on Rightmove in one month for the first time¹

2007

First iPhone launched
New build starts peak at 220,600 (turn to page 28)³

2011

Affordability ratio reaches its lowest point (turn to page 5)

2013

Help to Buy launched (turn to page 30)

2015

Mobile traffic overtakes desktop on Rightmove⁴

2017

Start of tax relief changes for landlords

2020

Final stage of tax relief changes for landlords

Regulation of Property Agents (turn to page 41)

Agent's view: How technology has changed estate agency



Tony Robinson

Group Operations Director,
Robinson Jackson Group
London & Kent

The Robinson Jackson Group boasts a unique number of "old-timers" (better referred to by us as "experienced" Owner Partners) who work alongside talented young staff. Both old and young are constantly discovering how technology can be utilised in an industry that traditionally relies so heavily on personal interaction.

During our 50-year journey we've radically modified our trading framework. From closed at weekends to open 9am – 7pm seven days a week and embracing new technology to ensure our core proposition is available 24/7.

20 years ago, we would have spent many hours sending mailing lists which was labour and cost-intensive. Now we use computers to send emails, run searches on Rightmove and data-mine our CRM system.

Since the advent of portals, we now have filtered and better-quality leads landing with us throughout the week, rather than on Thursday mornings with the release of the local newspaper.

"Technology has made it quicker than ever to launch a property to market. Within minutes we can send emails to waiting buyers, receive calls from Rightmove users and book viewings for that evening."

Technology has aided the management of information for agents, and in turn enables us to reach out to more home movers than ever before.

However, the emotive nature of home ownership and the emotional rollercoaster of moving mean businesses will thrive if they retain the ability to build their business on relationships.

Industry view: Advice for agents that stands the test of time



Peter Knight

Founder,
The Property Academy

As Rightmove celebrates its 20th anniversary, I realise that I've now passed the 40-year milestone in my property industry career.

I work with many outstanding firms through the Best Estate Agent Guide, giving me an outside-in view of what good estate agency looks like today.

A lot has changed in the last two decades, not least thanks to Rightmove consolidating the whole market into one incredible resource, but there are many more things that have remained the same.

Here's some advice that's just as important now as 20 years ago, and will be for many years to come...

1 Think about the next move for every current client and buyer; each time a new property comes to the market ask yourself "who do I know that would love this place?"

The best estate agents know they can make markets by connecting people and property.

Whilst the private rental sector has exploded in the last 20 years, home ownership is still the most desired tenure for many people.

2 Identify the true motivation of every home mover and work with their emotional drivers.

Our research shows that two-thirds of moves are due to life events (marriage, birth, divorce, death, job relocation, retirement etc). The remainder are those who want a better / bigger home or are buying for investment.

3 Always be professional and courteous, listen well with the intent to understand, be knowledgeable and informative and always quick to respond.

The "people buy people" cliché is true. Our research confirms the main reasons why sellers and landlords select one agent over another is likeability and trust.

Industry view: How times have changed for letting agents



Frank Webster

Owner,
FC Webster Consultancy

I started in the property industry in 1979 as a Trainee Negotiator in Oxford, moving to Finders Keepers six years later, where I eventually became vice-chairman. During my career, the day-to-day role of a Letting Agent has changed dramatically...

Before the internet and portals, we used card boxes to track and keep in touch with our applicants, telephoned or sent cables to our landlords and manually typed and posted tenancy agreements. We took photos on film cameras and produced our own write ups, working hard to ensure they were photocopied and in the post that night. We carried boards in the back of our cars and put them up ourselves.

Roll forward to the early 2000's and the millennium bug didn't destroy the world, but our obsession with bricks and mortar grew. Our success being the sum of our unique parts (buying, furnishing, refurbishment, letting & properly resourced property management, re-sale) and the integration of good technology and great systems and processes.

There's more change ahead for letting agents. As we move to a new world of qualification

and regulation for the lettings industry, it's an opportunity for agents who are prepared to make bold and positive steps.

"We can raise the standard of our service to landlords and tenants alike, so the public will hold our industry in the highest regard and younger people will aspire to become qualified letting agents."

I also expect the title "Asset Manager" will replace the outdated title of "Property Manager" as the job will entail planning, budgeting, forecasting and offering advice to increase the value and ROI of the asset.



Visit hub.rightmove.co.uk and search "Frank Webster" to read the full article

Industry view: The Regulation of Property Agents (RoPA)



Mark Hayward

Chief Executive,
NAEA Propertymark

"An industry that prioritises consumers interests can only lead to a healthier market, where agents are more trusted with their most valuable asset."

NAEA Propertymark has long recognised the need for holding estate agents to account and encouraging high standards throughout the industry. We are, after all, a sector that relies heavily on consumers to sustain us, their satisfaction and protection will always be a top priority.

The RoPA Working Group's report to government on the recommendations for future regulation is exactly what we believe the sector needs. The proposals include:

- A clearly outlined Code of Practice
- Minimum qualifications
- Formal licensing

Those already working to a high standard will easily transition into formal regulation, whilst the minority of poor-quality agents must either increase their own standards, or naturally leave the sector.

By working towards the proposed regulation standards, agents will become ready for the future and more appealing to potential customers.

For those who haven't done so, we recommend gaining a relevant qualification as proposed by the Working Group, which is a Level 3 for agents and a Level 4 for managing agents and company directors. Since these can take around a year of private study to achieve, the sooner you start, the better.

For more updates on the regulation and to hear how NAEA Propertymark will support their members visit hub.rightmove.co.uk and search "RoPA".

Developer's view: A digital revolution for home builders and consumers alike



Allan Walker

Director of Group Marketing,
CALA Homes - North, East & West
Scotland, Midlands and South East

I've been involved in the new homes industry for around 15 years and it has changed beyond recognition in that time.

When I joined the industry (originally on the agency side) marketing of new homes was still very traditional and led by "the property section" in printed media, with very little genuine understanding of who we were actually courting.

At CALA, we were harnessing digital marketing opportunities in a much more serious way by 2008 when the credit crunch hit, and I believe that really accelerated the change and value associated with digital marketing of new homes.

"House builders are really starting to turn on to the value of digital technology and the power it presents not only to sales and marketing, but the broader team from land through construction and beyond."

The consumer has tremendous power to research and make key decisions without engaging the house builder until they are ready. What is happening across all industries is a digital revolution, powered by smartphone and communications technology and it is only going to go one way.

Similarly, the availability of data to inform effective land acquisition and the technology to streamline build process has never been more readily available. As an industry we have been slower to react than others – but I think the tide is turning.

Developer's view: The future of customer experience in home building



Andrew Weaver

Chief Executive,
Strata
Northern England

We believe that the future of home building will centre around the customer experience.

We are seeking to embrace modern methods of construction that will, over time, help ease the skills shortage and make delivery times and quality more predictable. Rather than building homes at a distance and the customer buying the finished product, we have been working on a project to offer our customers something incredibly special – the ability to configure and customise their new home.

Our customer base is young, urban and keen to engage. The configurator tool allows them to personalise their new home and share inspiration with like-minded people via social media.

Customers can personalise their home when it suits them, without the need for many visits to the show homes. They can see exactly what their home interior will look like.

The tool helps them understand their budgets better and increases the sense of excitement and anticipation around what their home will become, leaving them free to dream about their future.

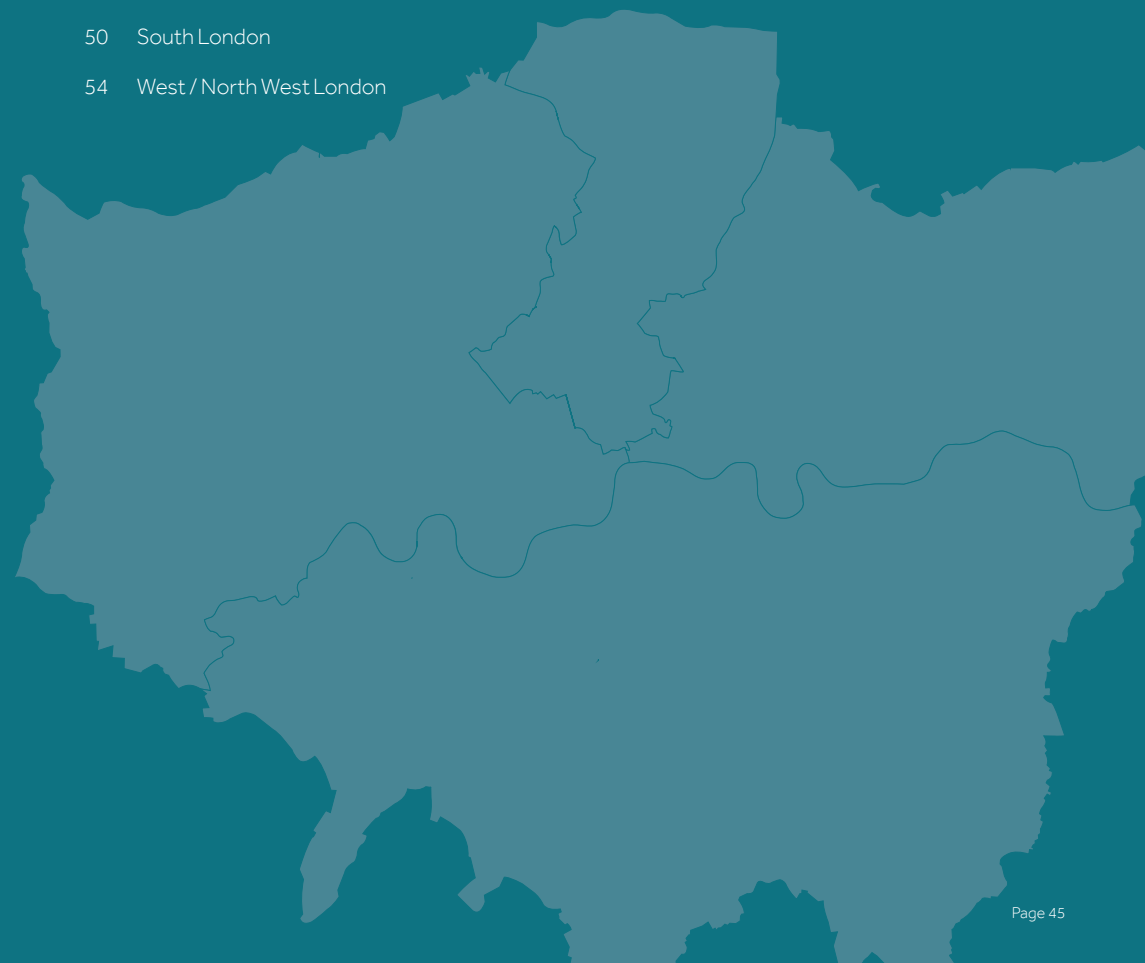
"The result is an experience they'll remember forever and a home that is truly reflective of them."

We believe the power of personalisation and advocacy from creating this experience will increase our brand awareness, reservations and ultimately reduce our cost of sale.

Your local property data

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- 48 East / North East London
- 50 South London
- 54 West / North West London



North London - Sales

First-time buyer properties (1 or 2 bedroom)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Camden	£682,635	-1.0%	4.7%	-20.8%
Enfield	£321,308	-1.6%	30.3%	-16.4%
Haringey	£451,618	-0.5%	17.4%	-14.8%
Islington	£577,036	-0.4%	6.0%	-21.0%

Second stepper properties (3 or 4 bedrooms)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Camden	£1,455,509	6.3%	2.7%	-24.3%
Enfield	£520,982	-1.7%	21.7%	-14.0%
Haringey	£741,042	2.7%	16.5%	-14.3%
Islington	£1,050,143	2.9%	5.8%	-23.2%

North London - Lettings

1 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Camden	£1,812	6.3%	10.5%	-13.6%
Enfield	£1,063	2.6%	16.2%	-16.4%
Haringey	£1,298	2.3%	10.2%	-11.8%
Islington	£1,765	6.5%	10.9%	-14.8%

2 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Camden	£2,500	2.9%	10.7%	-18.5%
Enfield	£1,344	0.9%	8.8%	-21.2%
Haringey	£1,616	3.3%	8.9%	-15.5%
Islington	£2,373	9.5%	12.2%	-7.5%

East / North East London - Sales

First-time buyer properties (1 or 2 bedroom)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Barking and Dagenham	£262,373	-1.2%	39.5%	-6.4%
Hackney	£489,089	-1.4%	13.8%	-17.2%
Havering	£283,832	0.7%	37.4%	-7.0%
Newham	£353,997	1.1%	36.2%	-15.3%
Redbridge	£312,184	-0.9%	37.1%	-14.9%
Tower Hamlets	£497,550	-2.1%	12.4%	-20.0%
Waltham Forest	£360,459	-2.0%	28.3%	-13.5%

Second stepper properties (3 or 4 bedrooms)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Barking and Dagenham	£350,680	-0.7%	39.2%	-13.6%
Hackney	£818,093	-5.0%	14.3%	-19.2%
Havering	£418,741	0.0%	33.0%	-7.9%
Newham	£478,315	3.1%	43.9%	-16.7%
Redbridge	£511,583	-0.8%	33.5%	-6.6%
Tower Hamlets	£747,976	-1.2%	15.0%	-12.0%
Waltham Forest	£570,979	0.4%	29.4%	-9.6%

East / North East London - Lettings

1 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Barking and Dagenham	£1,015	2.0%	18.4%	-25.1%
Hackney	£1,523	3.7%	11.5%	-26.6%
Havering	£928	2.5%	16.6%	-25.3%
Newham	£1,347	5.0%	20.3%	-20.4%
Redbridge	£1,041	6.8%	16.5%	-17.6%
Tower Hamlets	£1,629	2.7%	7.7%	-11.4%
Waltham Forest	£1,120	4.5%	19.1%	-13.8%

2 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Barking and Dagenham	£1,246	1.9%	13.0%	-12.4%
Hackney	£1,914	2.8%	8.4%	-16.2%
Havering	£1,170	1.9%	15.4%	-20.4%
Newham	£1,633	3.6%	16.1%	-23.9%
Redbridge	£1,310	1.9%	9.1%	-29.6%
Tower Hamlets	£2,129	5.4%	4.6%	-12.0%
Waltham Forest	£1,362	1.7%	11.1%	-20.7%

South London - Sales

First-time buyer properties (1 or 2 bedroom)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Bexley	£280,859	-1.4%	37.0%	-6.6%
Bromley	£342,111	0.8%	20.5%	-12.9%
Croydon	£291,863	-3.9%	27.9%	-12.3%
Greenwich	£372,290	-1.1%	31.8%	-12.1%
Kingston upon Thames	£387,183	-1.9%	11.4%	-16.0%
Lambeth	£468,211	-2.3%	3.6%	-15.9%
Lewisham	£355,503	-1.2%	21.7%	-8.2%
Merton	£397,028	-2.1%	8.5%	-20.6%
Richmond upon Thames	£490,165	-1.6%	5.7%	-14.6%
Southwark	£520,961	-0.2%	12.1%	-14.6%
Sutton	£299,984	-0.8%	24.2%	-6.4%
Wandsworth	£541,702	1.2%	6.1%	-15.4%

South London - Sales

Second stepper properties (3 or 4 bedrooms)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Bexley	£425,127	0.9%	32.8%	-8.0%
Bromley	£519,304	-0.8%	16.1%	-10.7%
Croydon	£456,575	-1.0%	24.5%	-20.2%
Greenwich	£500,353	-1.8%	27.4%	-5.1%
Kingston upon Thames	£628,751	-0.1%	13.6%	-12.2%
Lambeth	£687,486	-0.5%	10.4%	-20.1%
Lewisham	£586,587	0.6%	19.7%	-22.5%
Merton	£643,820	-1.4%	9.6%	-14.5%
Richmond upon Thames	£885,380	-0.3%	0.3%	-17.6%
Southwark	£821,614	1.5%	14.7%	-13.0%
Sutton	£501,416	1.0%	24.6%	-6.5%
Wandsworth	£929,899	1.9%	2.8%	-20.8%

South London - Lettings

1 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Bexley	£888	1.5%	17.1%	-1.0%
Bromley	£992	0.8%	12.5%	-16.4%
Croydon	£997	3.5%	15.3%	-24.6%
Greenwich	£1,248	2.2%	10.0%	-21.0%
Kingston upon Thames	£1,134	2.1%	7.2%	-13.9%
Lambeth	£1,518	4.1%	12.5%	-13.4%
Lewisham	£1,194	4.1%	16.4%	-15.2%
Merton	£1,247	3.1%	9.4%	-30.2%
Richmond upon Thames	£1,290	2.8%	5.3%	-12.3%
Southwark	£1,671	3.3%	11.6%	-13.1%
Sutton	£952	5.0%	15.0%	2.9%
Wandsworth	£1,522	3.1%	12.6%	-24.4%

South London - Lettings

2 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Bexley	£1,131	2.7%	19.1%	-6.5%
Bromley	£1,301	1.9%	9.3%	-20.7%
Croydon	£1,263	2.3%	10.9%	-23.9%
Greenwich	£1,546	3.5%	8.2%	-12.9%
Kingston upon Thames	£1,448	4.6%	5.1%	-23.9%
Lambeth	£1,891	4.9%	15.6%	-13.2%
Lewisham	£1,459	4.3%	11.8%	-21.1%
Merton	£1,616	6.3%	7.4%	-24.5%
Richmond upon Thames	£1,720	4.0%	5.1%	-14.9%
Southwark	£2,185	7.8%	16.6%	-2.4%
Sutton	£1,271	7.0%	13.9%	11.6%
Wandsworth	£2,103	12.4%	21.1%	-11.2%

West / North West London - Sales

First-time buyer properties (1 or 2 bedroom)

Region	Average asking rent			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Barnet	£397,203	-0.8%	20.0%	-17.1%
Brent	£394,355	-3.3%	12.4%	-21.4%
Ealing	£398,403	-1.6%	8.5%	-15.2%
Hammersmith and Fulham	£617,134	-2.6%	-3.4%	-15.2%
Harrow	£358,419	-0.4%	26.3%	-17.6%
Hillingdon	£323,029	-1.9%	31.6%	-9.2%
Hounslow	£366,491	-5.5%	8.5%	-12.2%
Kensington and Chelsea	£972,348	-0.5%	-9.4%	-17.3%
Westminster	£941,440	0.4%	0.5%	-17.5%

Second stepper properties (3 or 4 bedrooms)

Region	Average asking price			New listings
	Price (Q3 2019)	1 year change	5 year change	1 year change
Barnet	£687,907	1.0%	17.3%	-16.2%
Brent	£656,051	-1.6%	4.7%	-20.6%
Ealing	£620,859	0.2%	12.5%	-18.3%
Hammersmith and Fulham	£1,288,322	6.6%	0.2%	-19.1%
Harrow	£569,884	-2.0%	17.6%	-19.8%
Hillingdon	£510,857	0.9%	31.3%	-7.7%
Hounslow	£598,566	-1.0%	7.9%	-21.4%
Kensington and Chelsea	£2,644,038	0.0%	-10.1%	-17.3%
Westminster	£2,375,535	-1.1%	-1.9%	-14.6%

West / North West London - Lettings

1 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Barnet	£1,214	5.1%	15.0%	-12.8%
Brent	£1,310	3.7%	11.2%	-7.9%
Ealing	£1,269	1.4%	8.8%	-18.4%
Hammersmith and Fulham	£1,689	3.9%	14.8%	-22.9%
Harrow	£1,103	1.8%	16.3%	-15.9%
Hillingdon	£1,064	5.4%	17.9%	-3.7%
Hounslow	£1,269	2.9%	2.0%	-19.2%
Kensington and Chelsea	£2,171	5.8%	4.3%	-10.8%
Westminster	£2,306	3.6%	13.1%	-14.7%

2 bedroom properties

Region	Average asking rent			New listings
	Rent (Q3 2019)	1 year change	5 year change	1 year change
Barnet	£1,539	4.3%	11.1%	-14.9%
Brent	£1,625	2.6%	8.1%	-7.7%
Ealing	£1,599	1.2%	6.8%	-25.6%
Hammersmith and Fulham	£2,350	4.6%	21.9%	-18.5%
Harrow	£1,384	3.0%	9.5%	-25.6%
Hillingdon	£1,324	1.4%	9.0%	-10.2%
Hounslow	£1,635	3.1%	-4.2%	-27.8%
Kensington and Chelsea	£3,205	0.3%	5.3%	-12.9%
Westminster	£3,392	3.5%	10.9%	-11.8%

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Useful contacts

You have several specialist teams available to support you as a member. Your Account Manager is your first point of call, but you can contact any of our teams with specific questions:

Estate and Letting Agents

Customer support: 01908 712300 or customersupport@rightmove.co.uk

E-leaflets:
digitalmarketing@rightmove.co.uk

Invoice queries:
accounts@rightmove.co.uk

Share your feedback

The Little Blue Book is intended to be an insightful guide for Estate and Letting Agents and New Homes Developers, to support your business planning for the year ahead. We're always looking for ways to improve, so if you have any feedback or would like to get involved with next years' book, we'd love to hear from you. Please drop us a note on marketing@rightmove.co.uk

New Homes Developers

Customer support: 01908 712213 or newhomes.developers@rightmove.co.uk

Digital Marketing:
digitalmarketing@rightmove.co.uk

Design studio: 01908 712014 or hub.rightmove.co.uk/design-studio

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