

**5.5%** market share

Nearly **600** branches

**6,800** staff

**Successful**  
apprenticeship scheme

**25** local brands from  
Glasgow to Plymouth

UK's **most profitable**  
estate agency business

**63,000** property sales a year

**Largest agency** for new  
homes sales in the UK

**90+** land and new homes  
specialists nationwide

**9,000** new homes  
sold per year

**Connells**  
group

One of the largest & most  
successful estate agency  
& property services provider  
in the UK

**65** industry awards

**UK's leading** EPC provider

**£10bn+** mortgage lending

**750+** employed Mortgage  
Consultants

**One of the UK's largest**  
conveyancing businesses

**60,000+** tenancies managed

**Leading** survey and  
valuation business

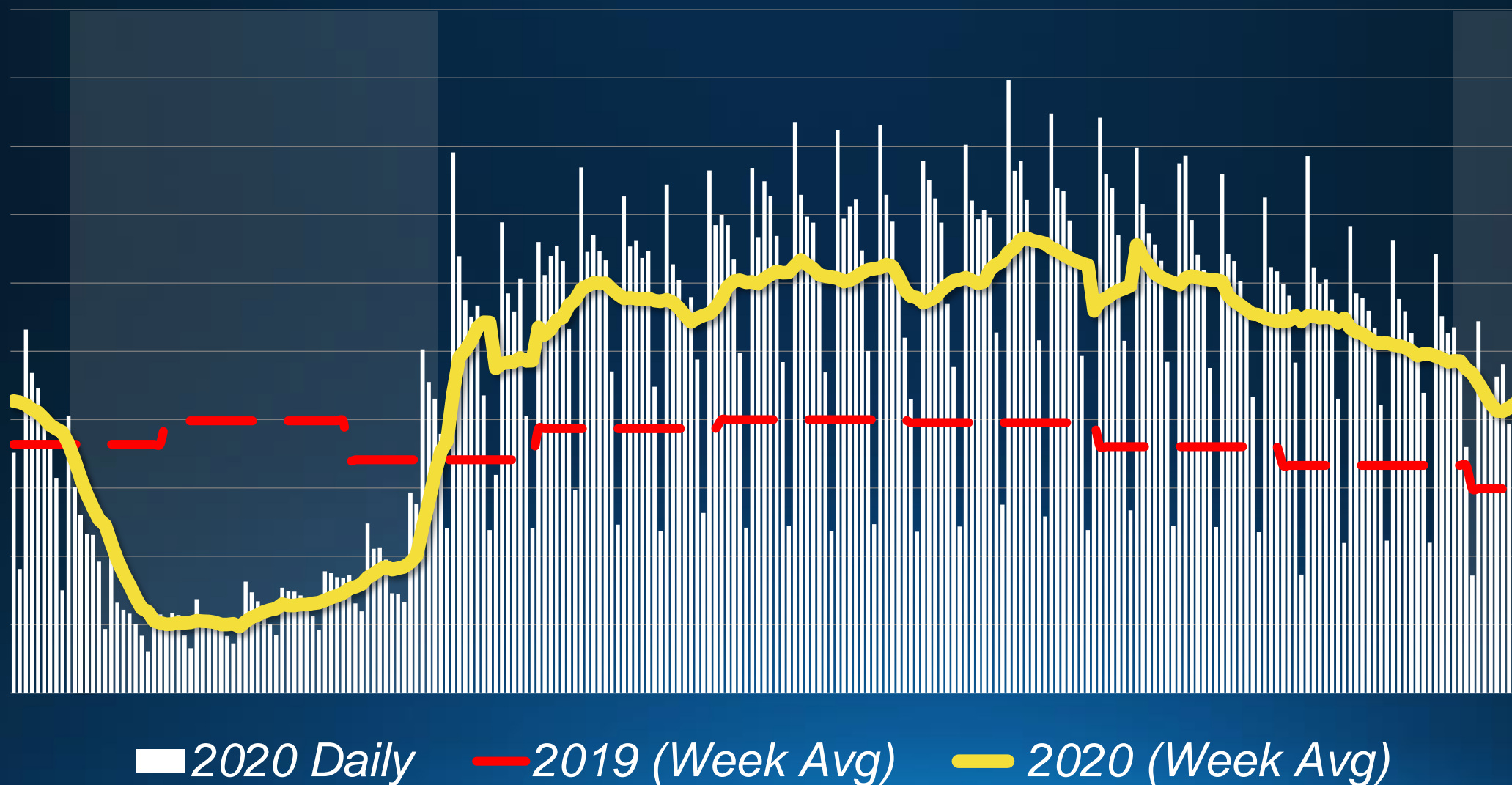
**300+** RICS Surveyors

**ISO 9001:2015** panel and risk  
manager of valuations

**One of the largest** volume residential  
property auctioneers in the UK

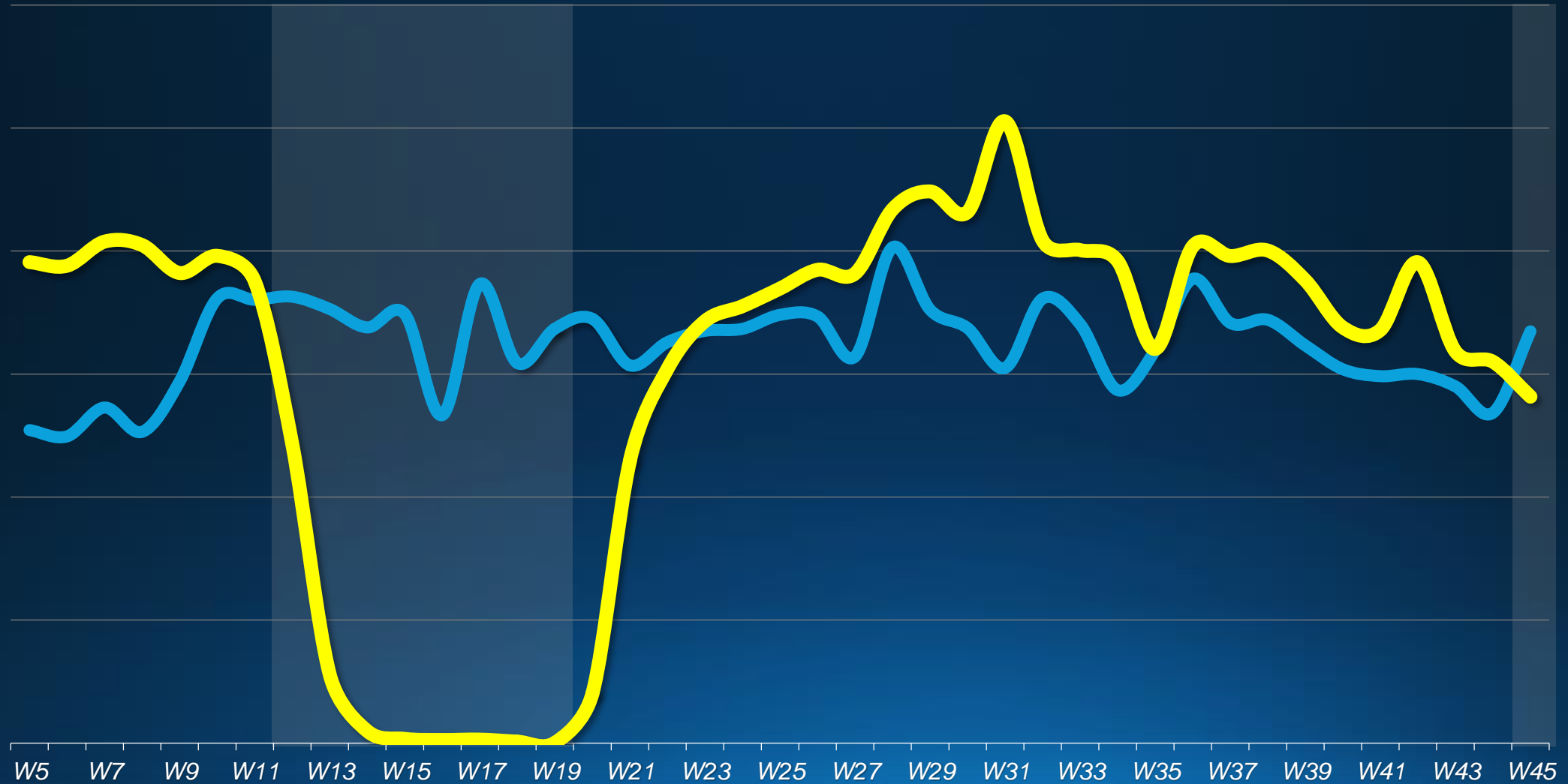
# Strong & Sustained Demand

*Portal enquiries*

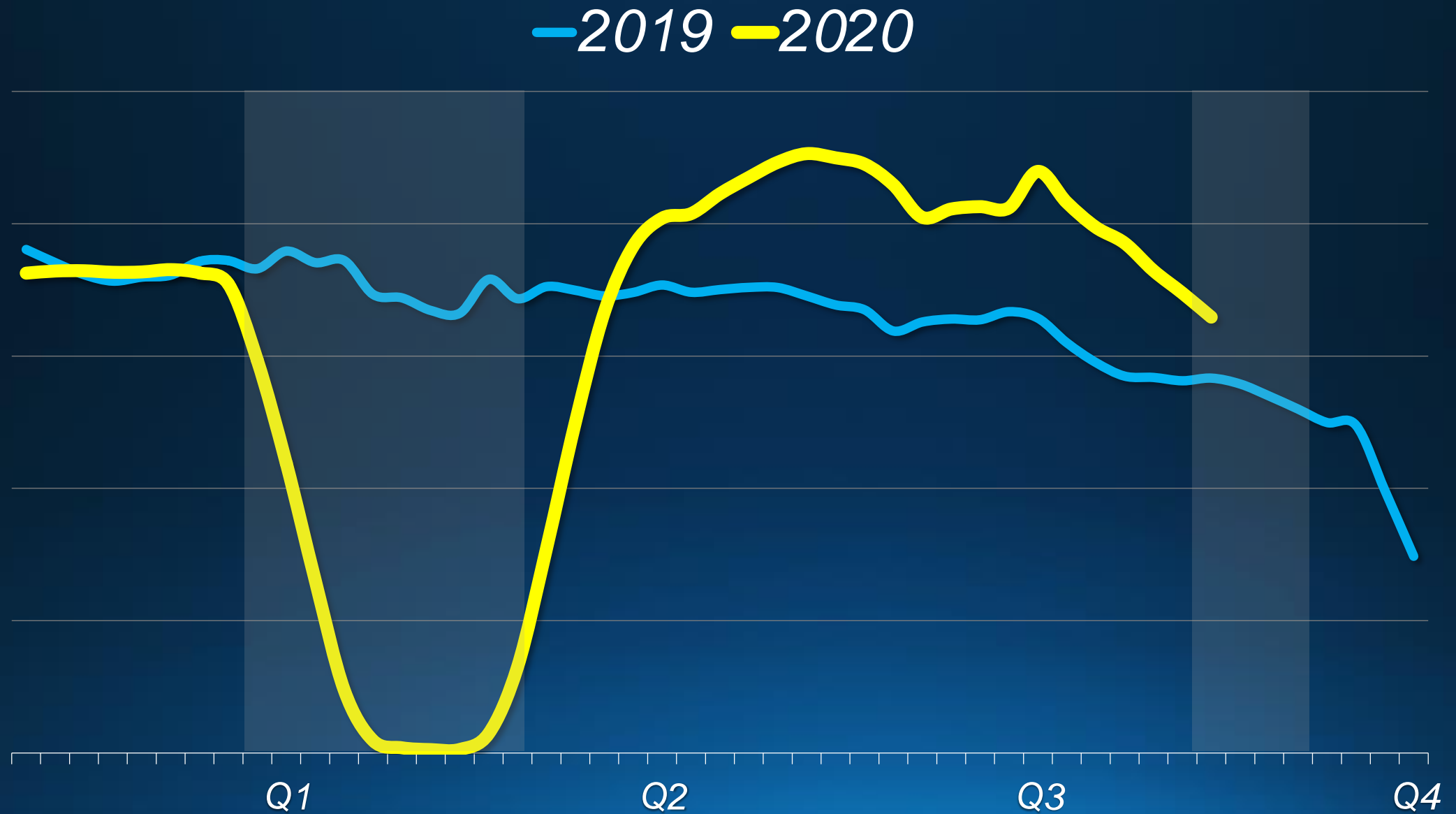


# Market Appraisal Activity

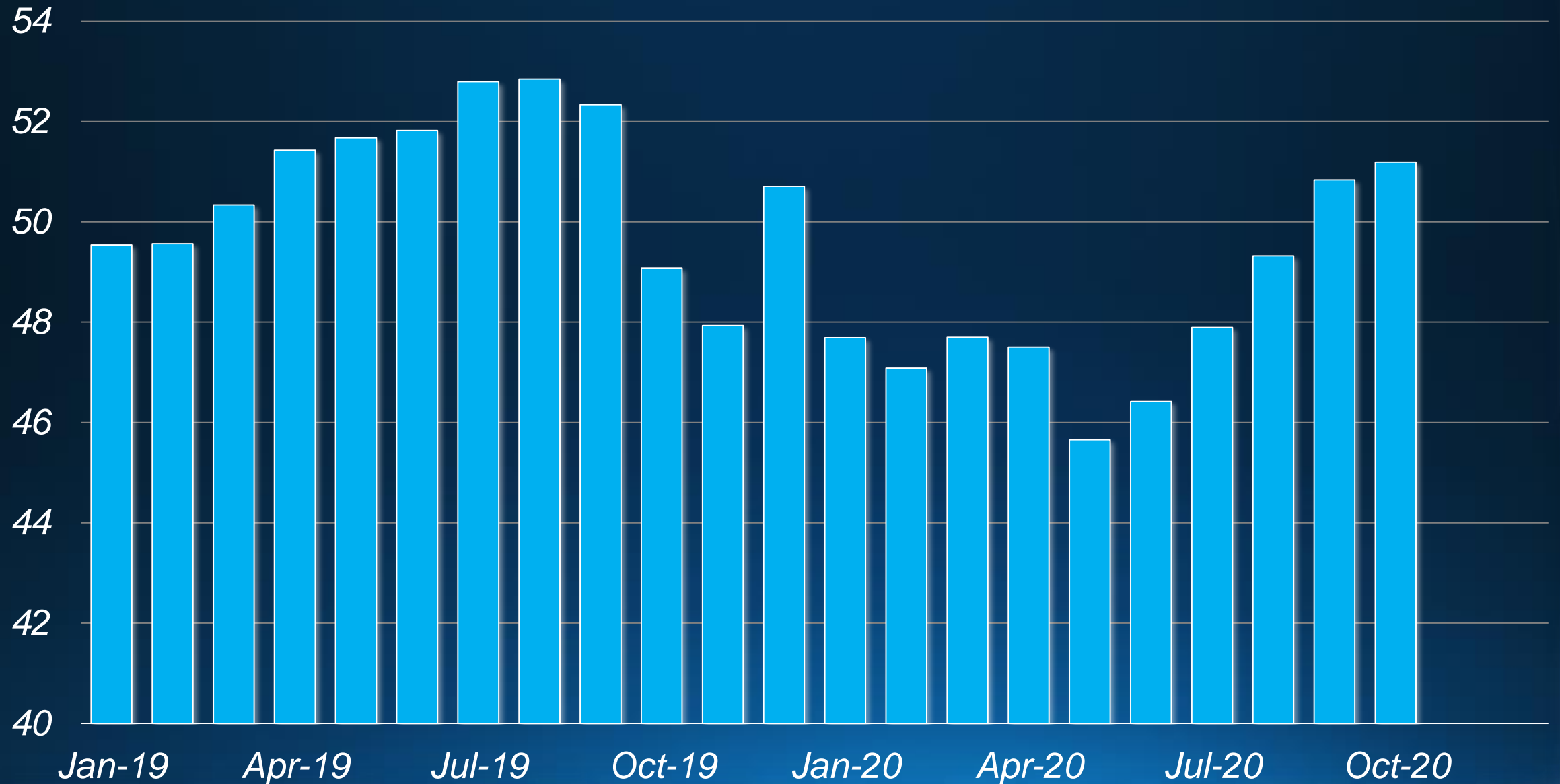
—2019 —2020



# New Instructions

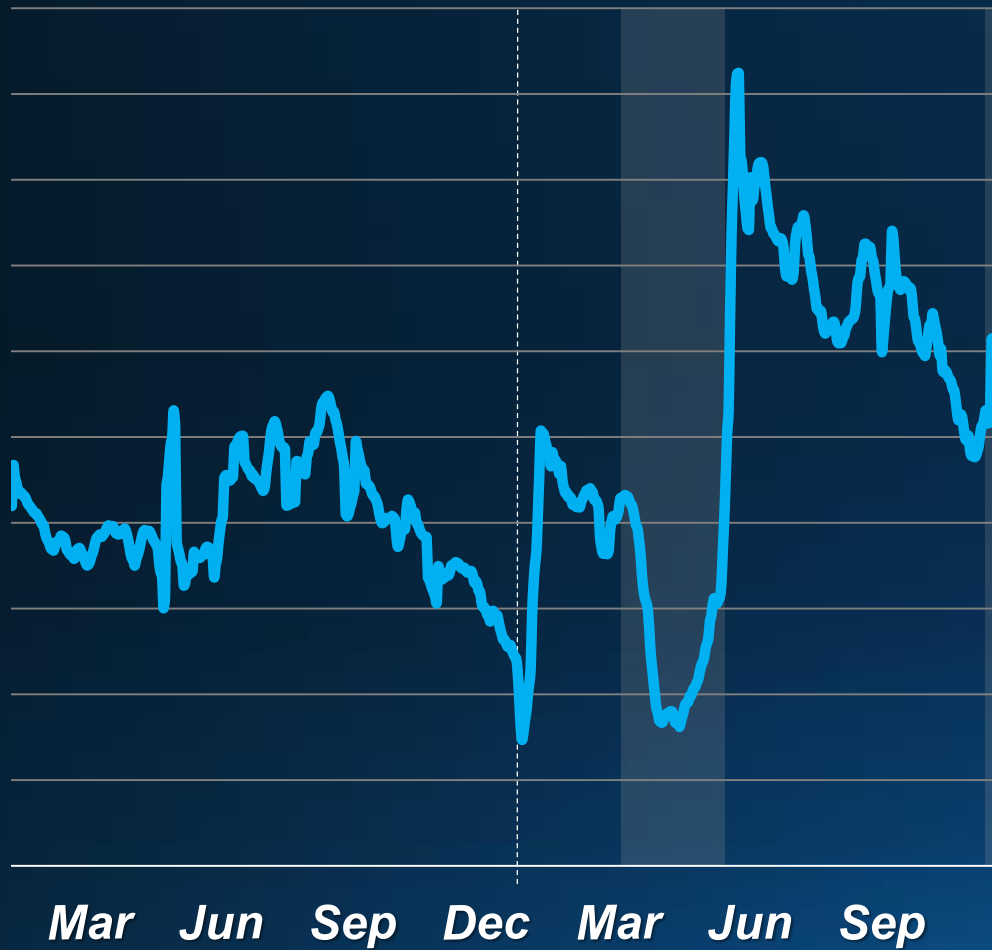


# Average Stock Per Branch

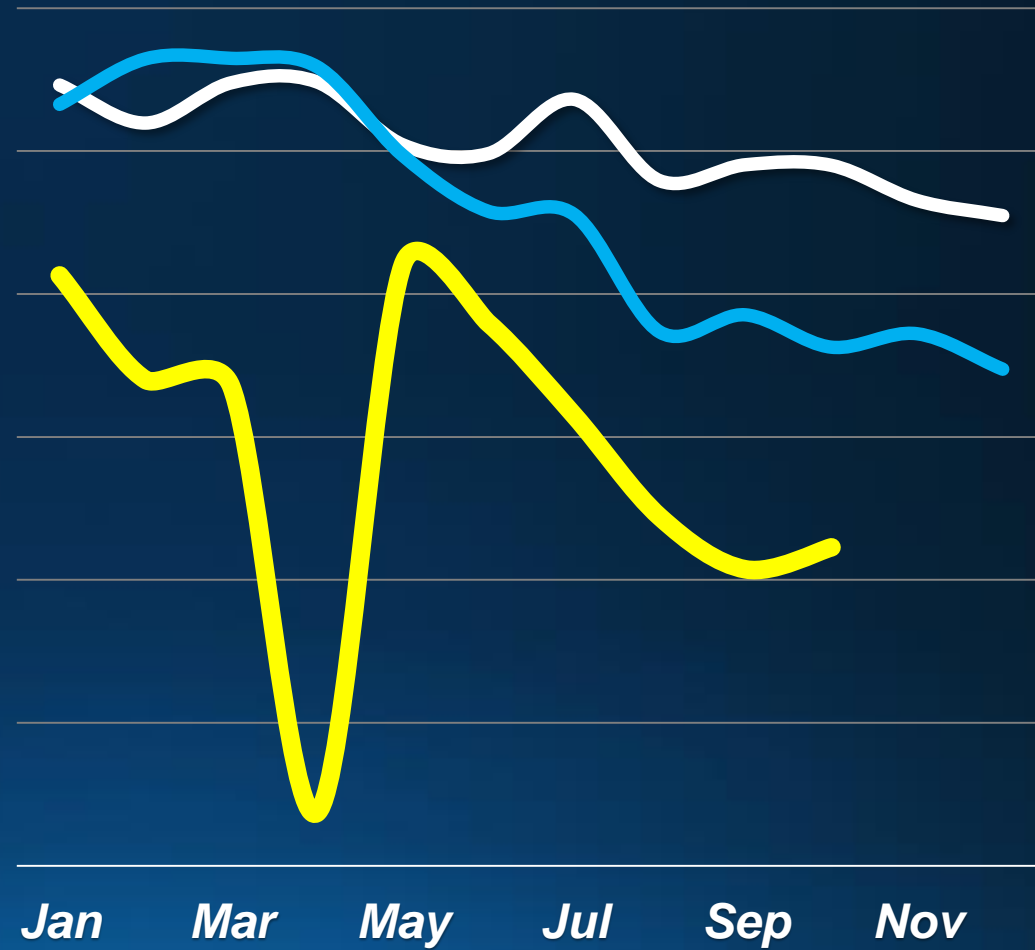


# Lettings Market

*Portal enquiries*



*Available stock*



—2018 —2019 —2020

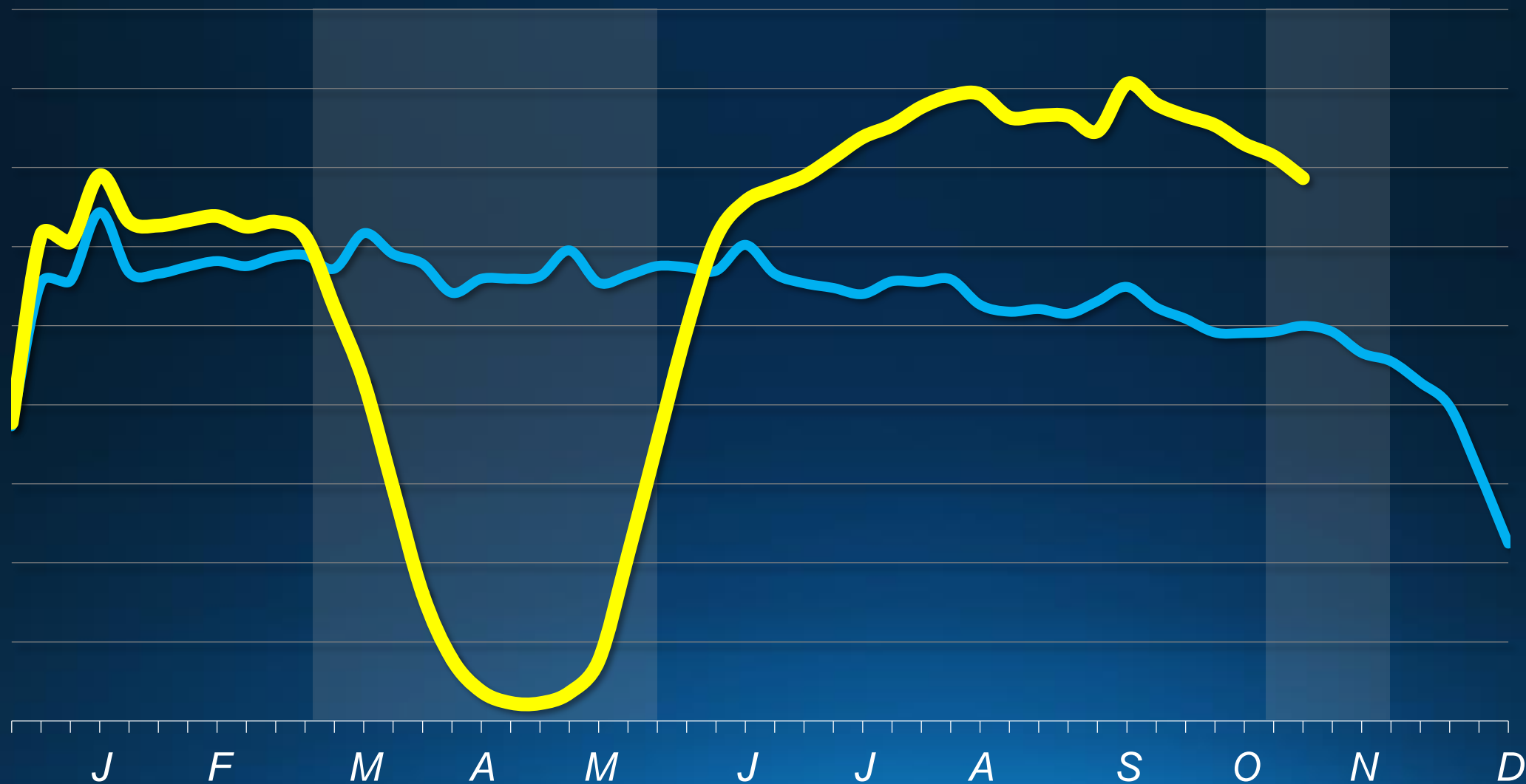


# Buyer Registrations – October 2020 vs 2019

	First-time buyers
Scotland / North	↑ 18%
Midlands	↑ 26%
Wales / South West	↑ 8%
East	↑ 24%
London	↑ 8%
South East	↑ 18%

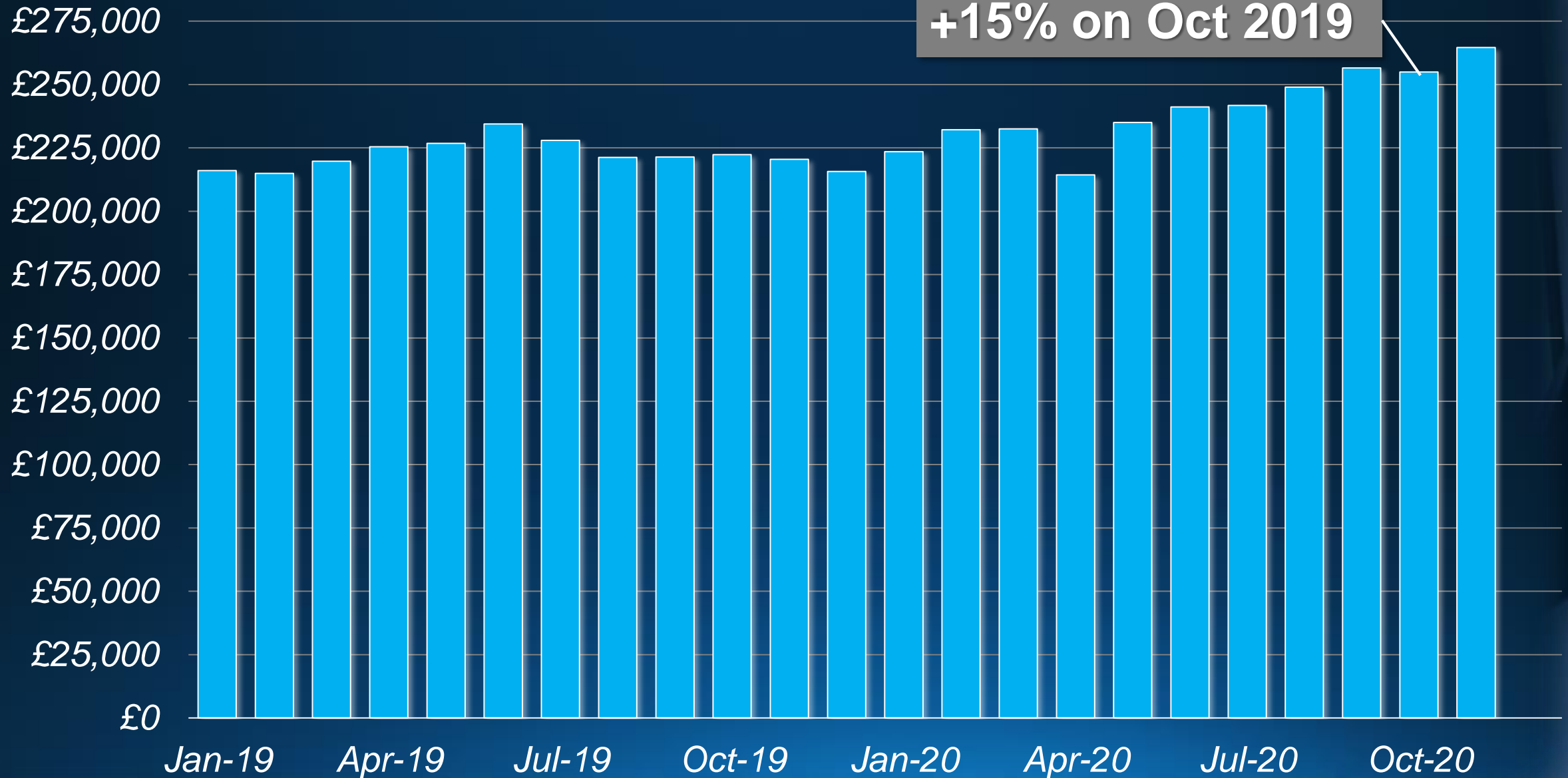
# Connells Group Weekly Sales

— 2019 — 2020



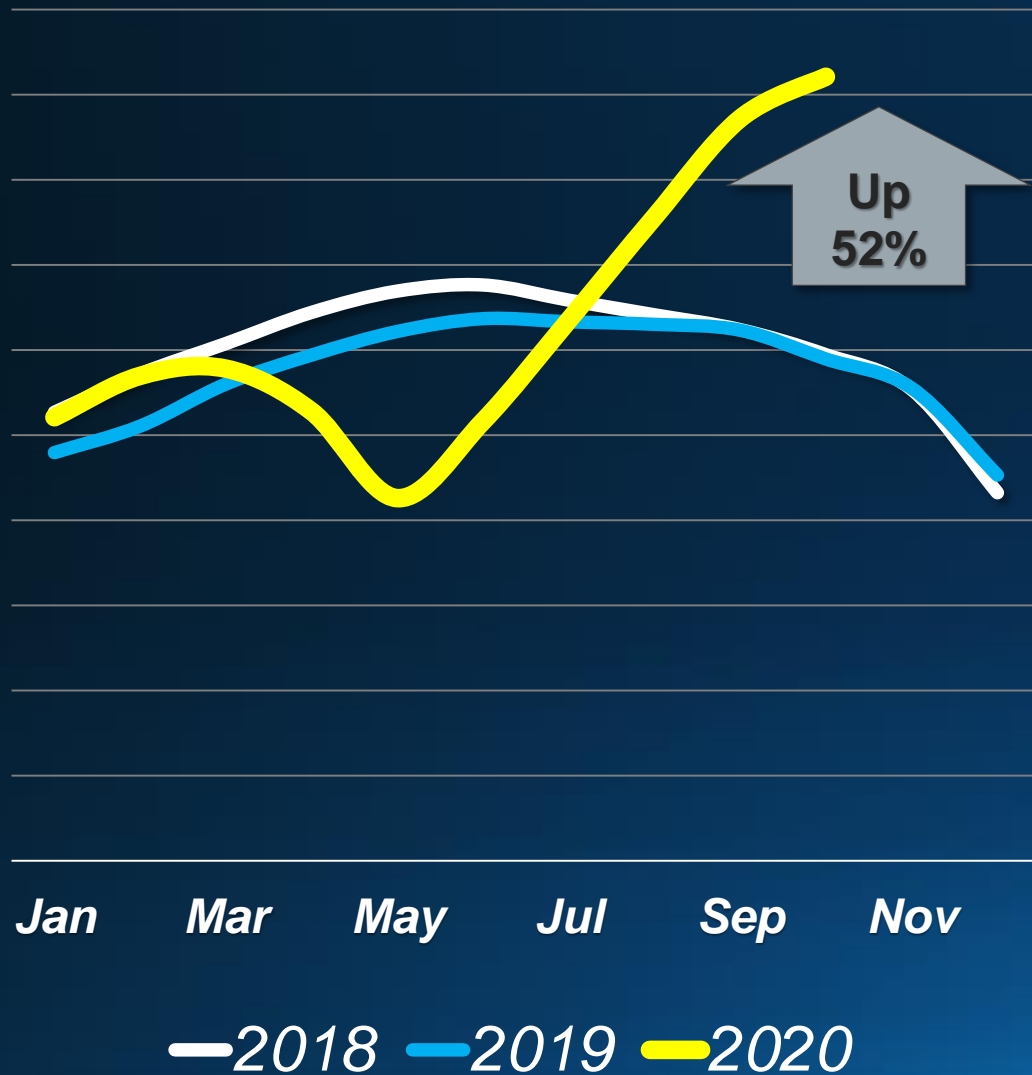


# Average House Price @ Sale Agreed



# Sales Pipeline

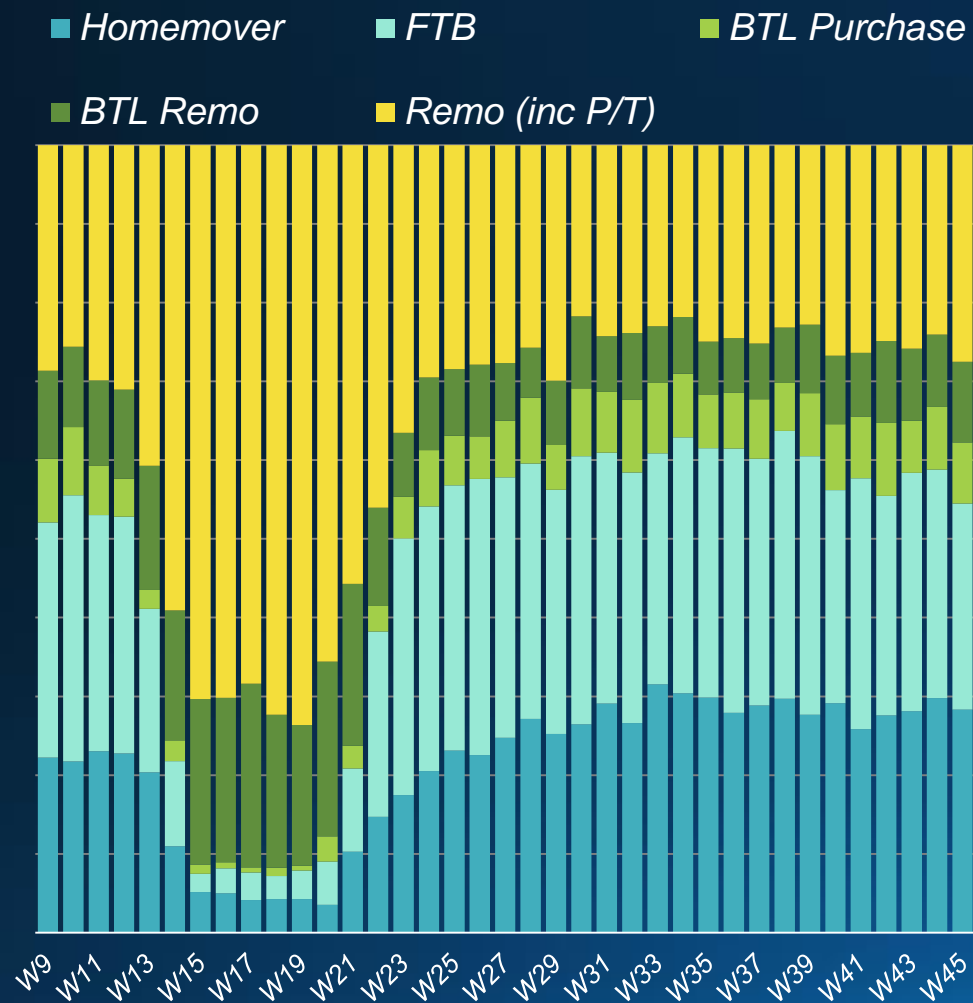
*No. properties*



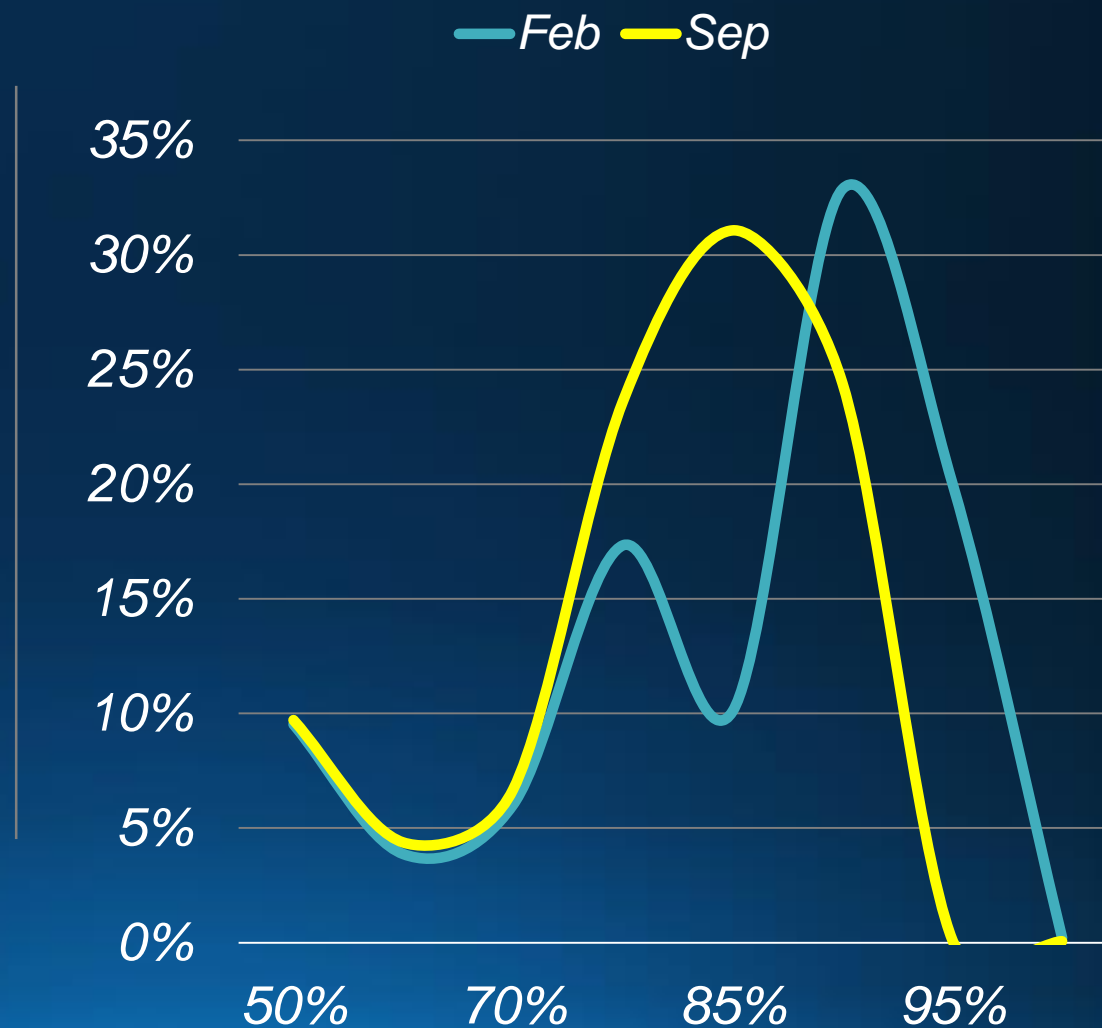
- Record pipeline still growing by the day
- Deadline looming for new sales to be agreed
- Pressure in the system, delays with
  - Searches
  - Conveyancing
  - Lenders
  - Chains

# Mortgage Market

*Mortgage Mix*



*First-time Buyer LTV Distribution*

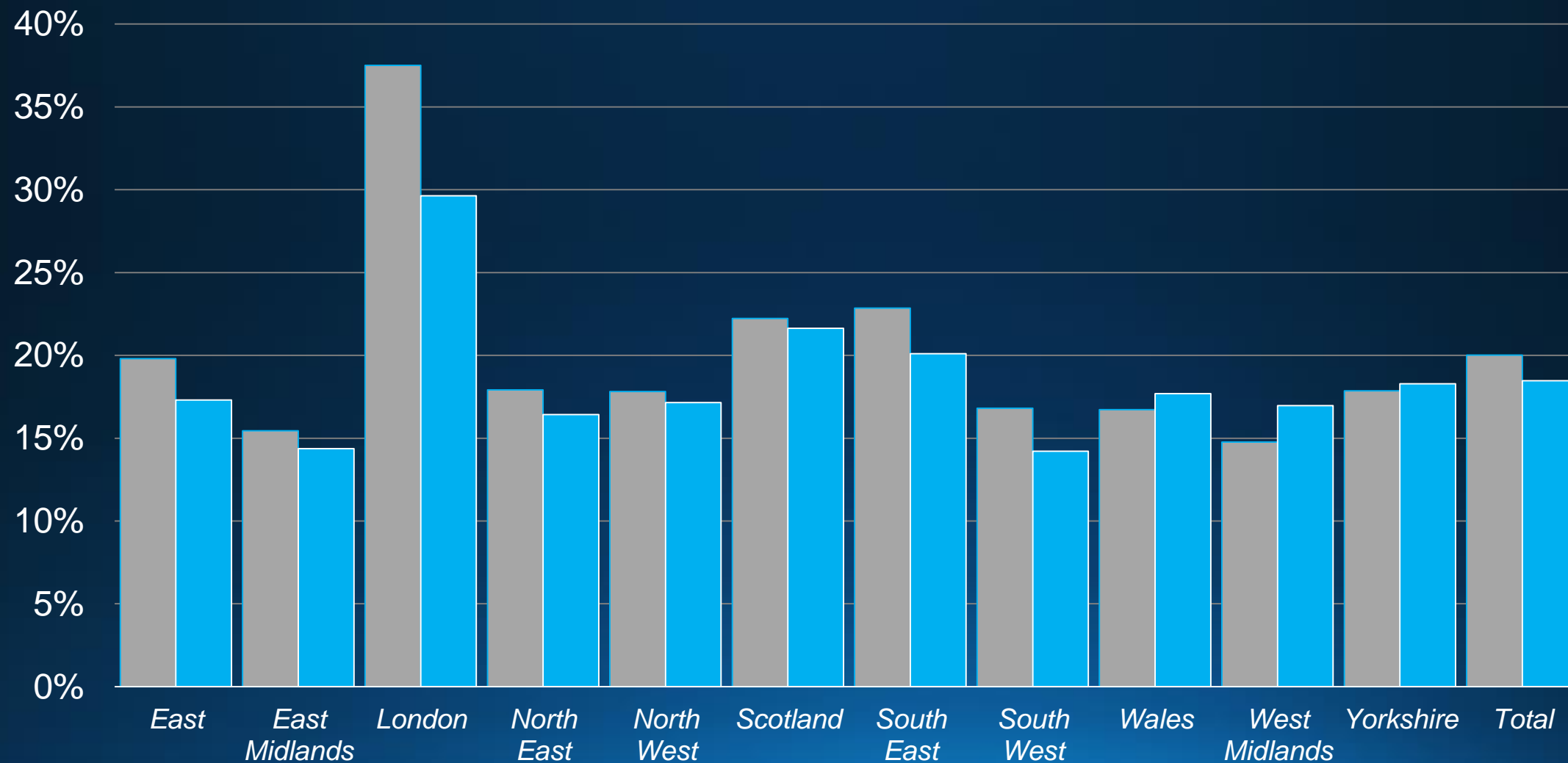


# Valuation Challenges (Market)

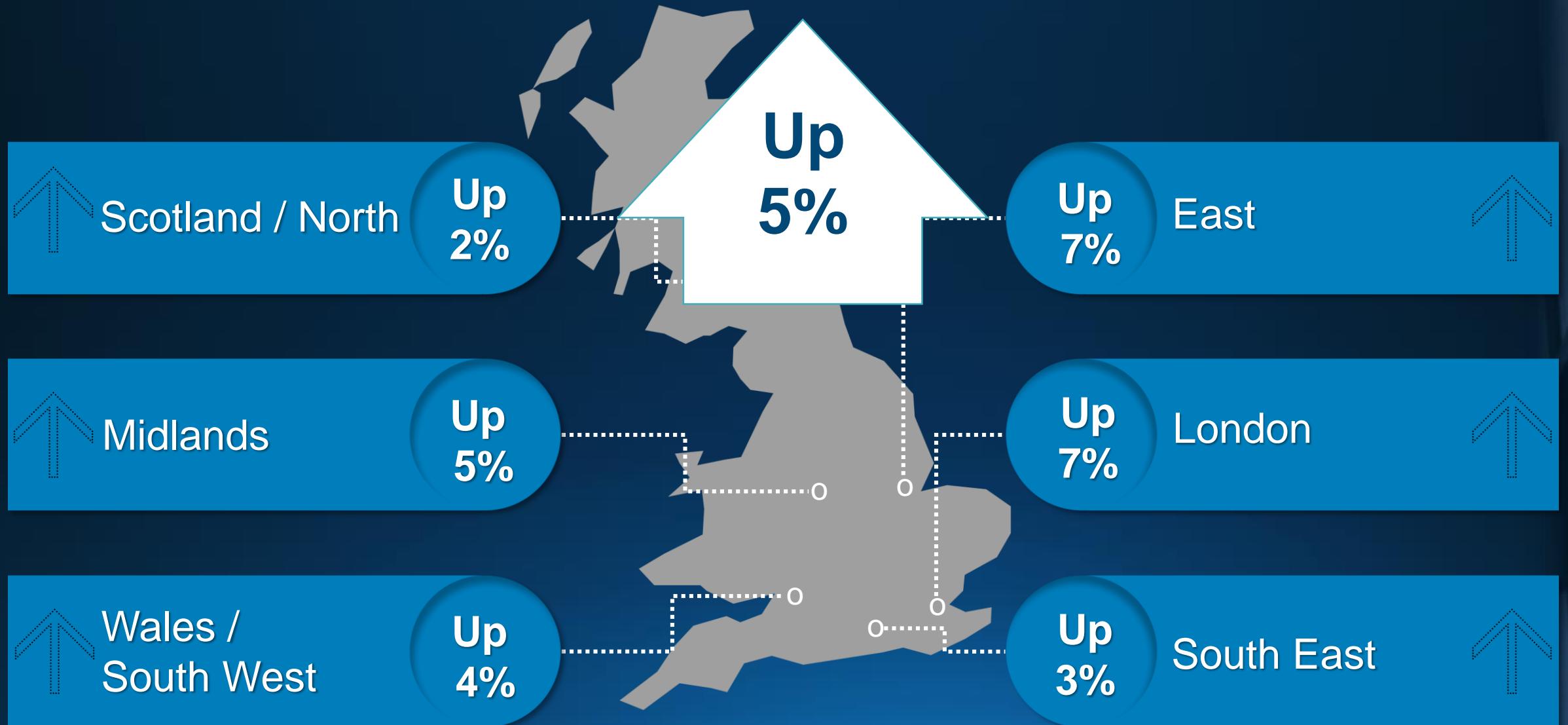
Connells

SURVEY & VALUATION

■ Q3 2019 ■ Q3 2020



# Connells Group Regional House Prices - Q3



# The Perfect Storm: 31<sup>st</sup> March 2021

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- ❑ Help to Buy changes
- ❑ End of Furlough
- ❑ End of Stamp Duty holiday

Q: *Why should an Estate Agent never look out of the window in the morning:*

A: *Because he'll have nothing to do in the afternoon!!*