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Analytical Report
Sale Market Analysis (December, 2025)

Greater London

Intelligence Team

Overview

The following report represents information on sale properties in various postcode districts in Greater London.

Key Metrics

- *Total properties for sale :*   This value indicates the total number of properties available on the market for sale in a month.

- *Average transactions per month :*   The average number of properties sold in a calendar month

- *Months of inventory :*   The amount of time it takes for the said "total properties for sale" to be sold out.

- *Turnover percentage per month :*   The proportion of properties that change hands each month.

- *Days on the market :*   The average number of days it takes for a property to be sold out.

- *Market Rating :*   This value provides a qualitative assessment of the market type based on certain criteria including demand, sale price etc.

- *Sellers Market :*   Market with high demand and less supply.

- *Balanced Market :*   Market with approximately equal demand and supply.

- *Buyers Market :*   Market with high supply and less demand.
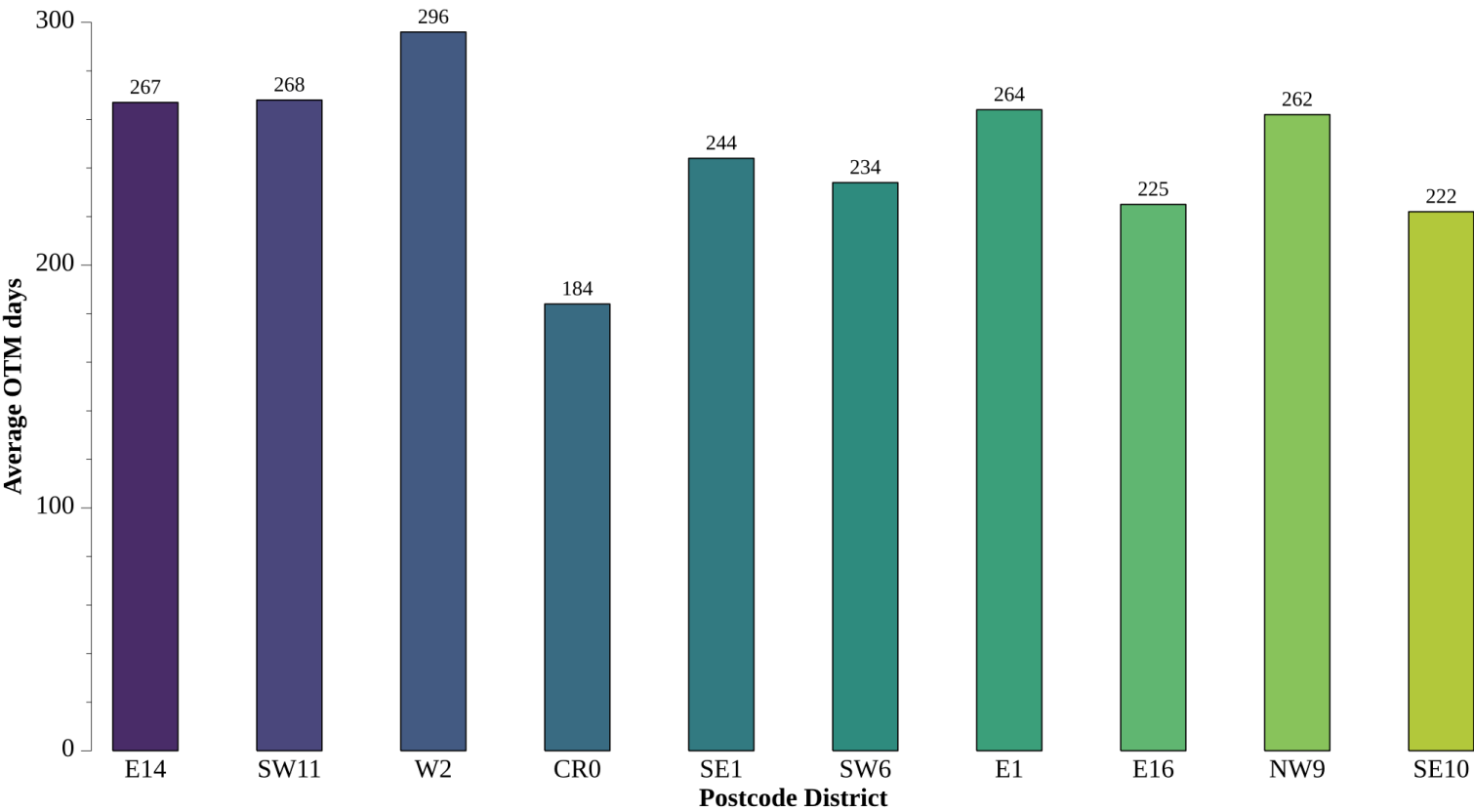
High-level Analysis

The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for December 2025.

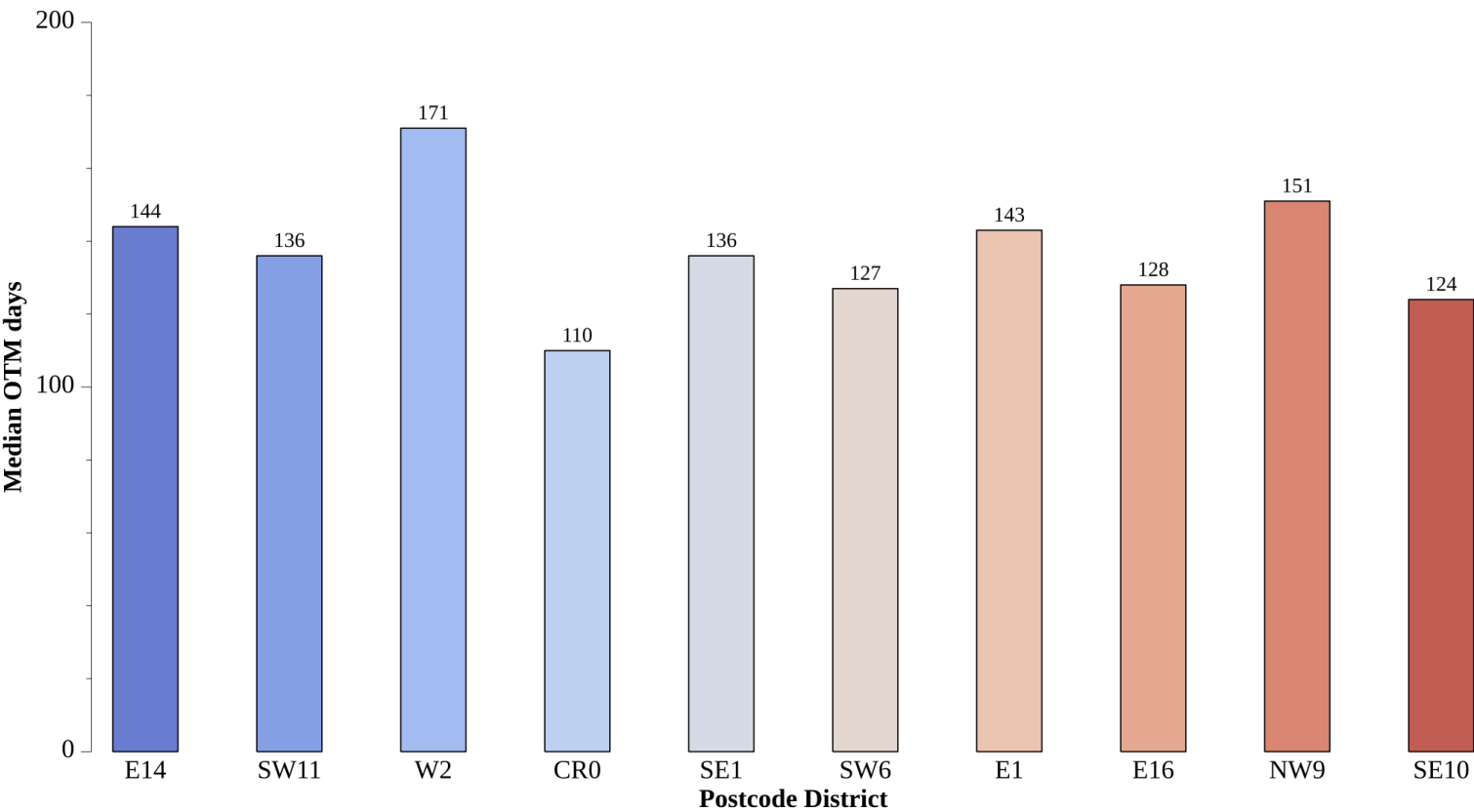Total Properties for Sale in Top 10 Districts - December 2025

December brings a clear seasonal slowdown, but its impact varies by area. Premium districts like W2, SW11 and E14 stay buyer-led not due to falling prices, but because winter reduces urgency and higher-end homes sit longer, large gaps between mean and median prices show sellers still aiming high while real demand is lower, giving buyers room to negotiate. Balanced areas such as CR0, SW6, SE1 and SE10 absorb the slowdown better, with tighter pricing and quicker median sales driven by more practical, need-based buyers.

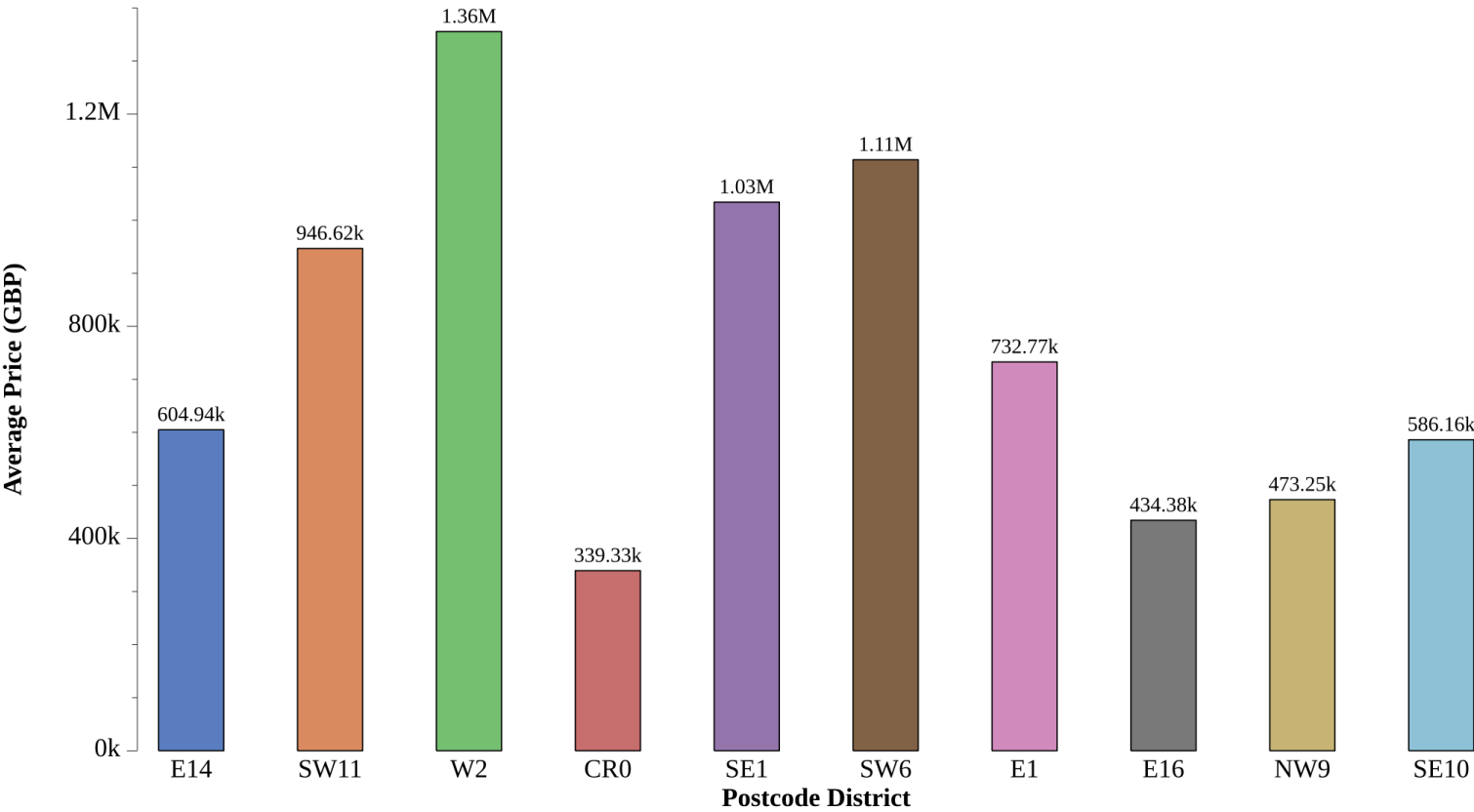## Average OTM days in Top 10 Districts - December 2025

Postcode District	E14	SW11	W2	CR0	SE1	SW6	E1	E16	NW9	SE10
Average OTM days	267	268	296	184	244	234	264	225	262	222

Median OTM days in Top 10 Districts - December 2025

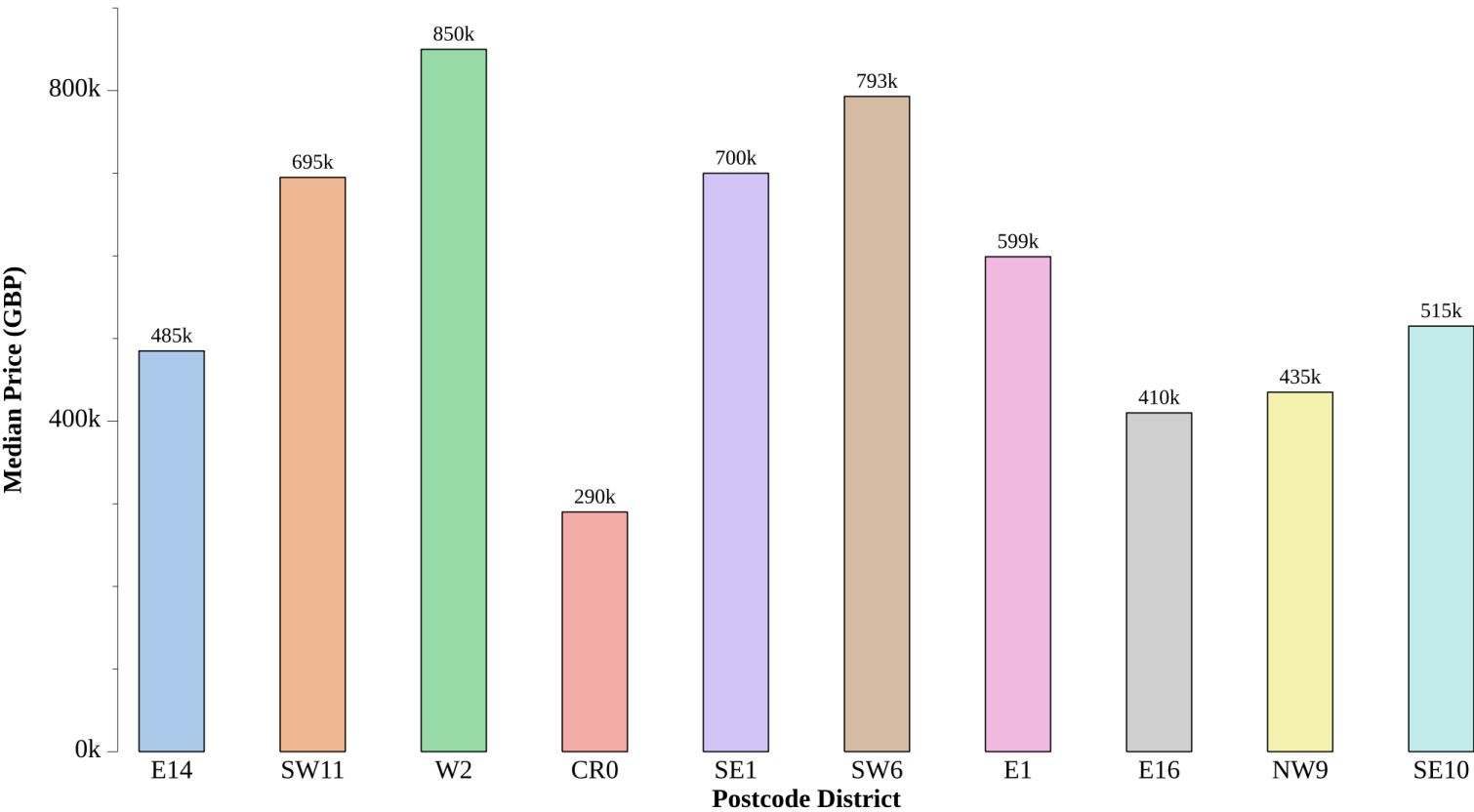| Postcode District	E14	SW11	W2	CR0	SE1	SW6	E1	E16	NW9	SE10
Median OTM days	144	136	171	110	136	127	143	128	151	124

December's time on market patterns quietly expose where pricing confidence is misaligned with winter demand. In buyer-led districts like W2, E14, E1 and SW11, very long mean OTM alongside much lower medians suggests a split market: realistically priced homes are still finding buyers, but a growing tail of high-priced listings is stalling and pulling averages up. This isn't just seasonality, it's sellers anchoring to autumn expectations in a month when buyers are selective. By contrast, balanced districts (CR0, E16, SE10, SW6) show shorter and tighter OTM ranges, even at very different price levels, indicating that price realism matters more than absolute affordability in December. Notably, CR0's relatively low prices don't just speed sales; they reduce seller hesitation, limiting how long homes are allowed to linger.

The widening gaps between mean and median prices, especially in higher-priced districts like W2, SW11 and SE1, signal that a small set of ambitious listings is stretching the top end while most buyers transact closer to the median, this is why OTM stays high despite a buyer-led rating. Homes priced near the median are quietly moving, but inflated listings linger and inflate average prices and OTM days. In contrast, areas with tighter mean, median spreads (CR0, E16, SE10) show lower OTM because price expectations are closer to what winter buyers will actually pay.
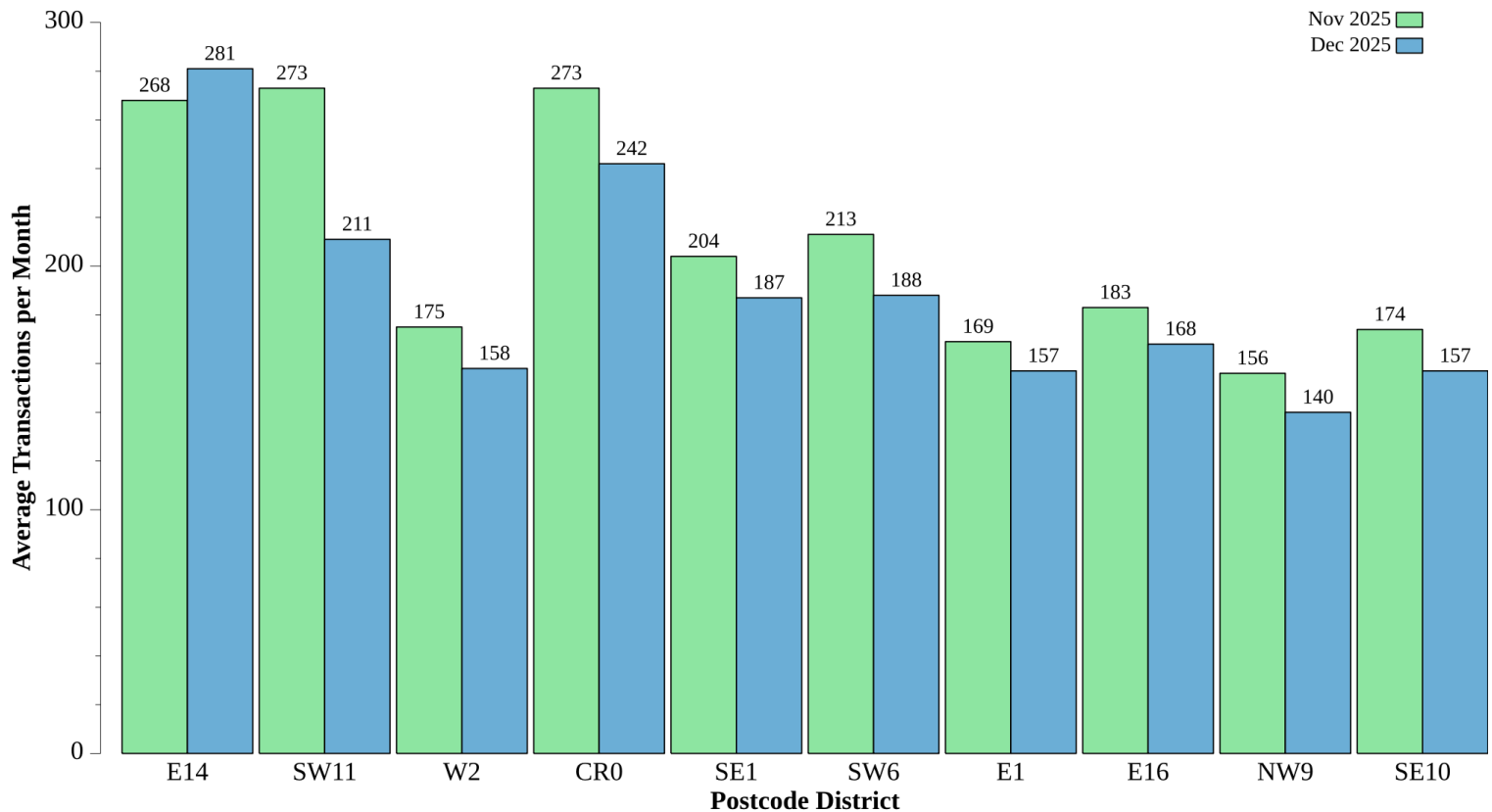
Average Price in Top 10 Districts - December 2025

Median Price in Top 10 Districts - December 2025

Comparison of Average Sale Transaction per Month in Top 10 Districts - November 2025 vs December 2025

From November to December, the data shows a classic seasonal handover rather than a structural slowdown. Transaction volumes ease almost everywhere as December attention drops, but the way stock responds is telling. E14 is the outlier: listings rise while transactions also increase, implying sellers are listing ahead of spring and buyers are selectively active, keeping turnover stable despite winter. In contrast, higher-priced and discretionary markets like SW11, W2, SE1 and SW6 see sharper transaction pullbacks than stock reductions, softening turnover, buyers pause, but sellers haven't fully adjusted yet. More value-driven districts (CR0, E16, SE10) show smaller drops and retain relatively high turnover, suggesting necessity-led demand absorbs seasonality better.

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Insights - December 2025

Market Trends and Dynamics

Across districts, December reveals a split between "listing intent" and "buyer action." Areas like E14 and W2 keep absorbing new stock even in winter, but long OTM and high months of inventory show that demand is filtering hard on price realism, not location. In contrast, CR0 and E16 convert stock faster because affordability compresses decision time, making these markets less seasonal and more transactional.

Market Fluctuations and Variability

Price dispersion explains volatility better than volume: where the mean sits far above the median (W2, SE1, SW6), time on market stretches unevenly, creating a long tail of unsold, optimistic listings. Districts with tighter mean–median gaps show lower OTM variability, meaning prices adjust quickly to seasonal drops in attention instead of drifting for months. This quiet repricing creates stability without visible price cuts.

Market Possibilities and Opportunities

Winter is quietly stock-building premium areas for spring resets: long OTM combined with low recent listings hints at sellers waiting, not exiting, which sets up negotiation-led clears later. Balanced, mid-priced districts already behave like "liquidity hubs," where capital can rotate with less timing risk. The opportunity lies less in chasing discounts and more in identifying where OTM is shortening despite

seasonality, those markets signal price acceptance before momentum returns.