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Analytical Report

Rent Market Analysis (December, 2025)

Greater London

Intelligence Team

Overview

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

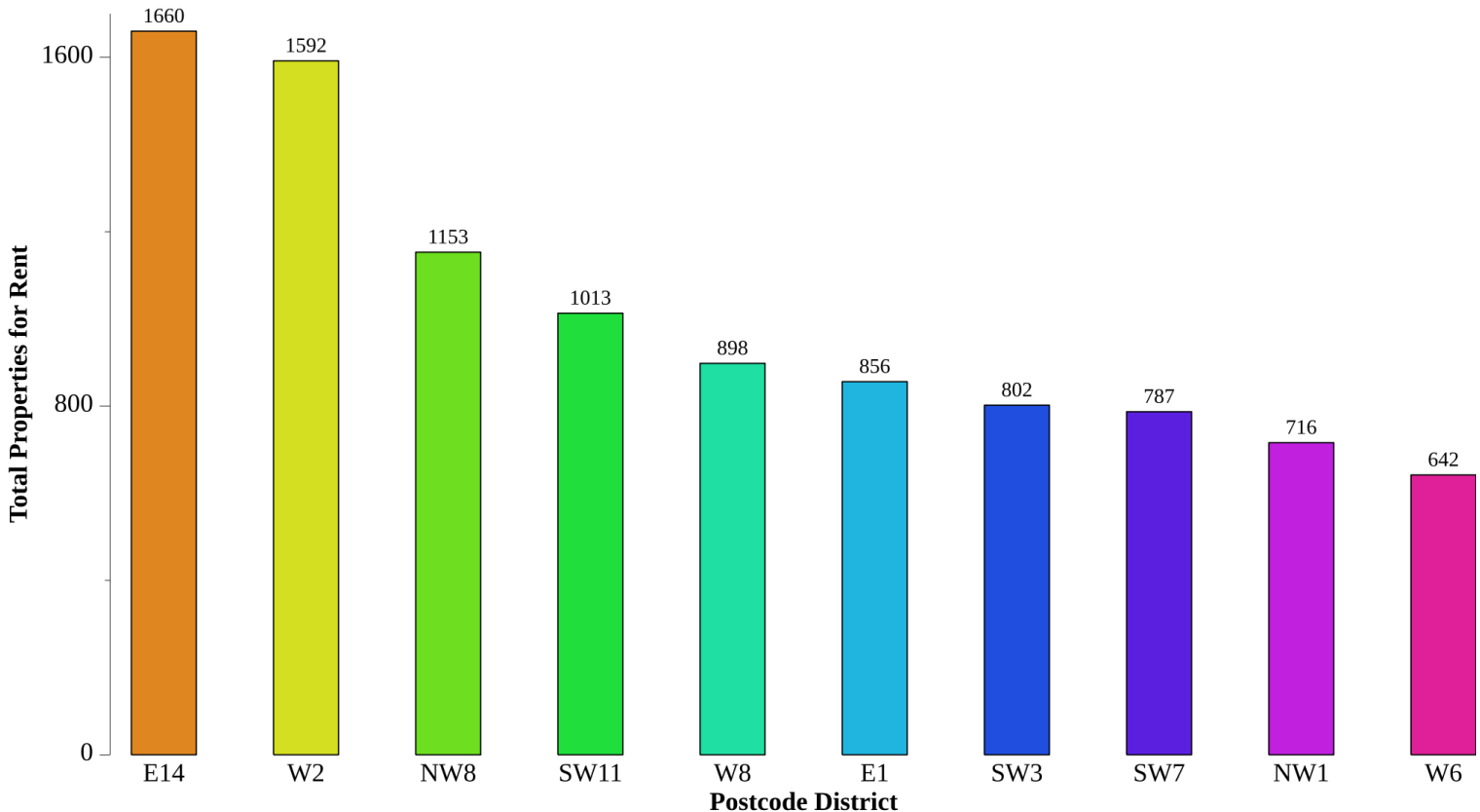
Key Metrics

- Total properties for rent : This value indicates the total number of properties available on the market for rental purposes in a month.
- Average transactions per month : The average number of properties rented out per month.
- Months of inventory : The amount of time it takes for the said “total properties for rent” to be rented 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 rented out.
- Market Rating : This value provides a qualitative assessment of the market type based on certain criteria including demand, rental price etc.
 - Landlords Market : Market with high demand and less supply.
 - Balanced Market : Market with approximately equal demand and supply.
 - Tenants Market : Market with high supply and less demand.

High-level Analysis

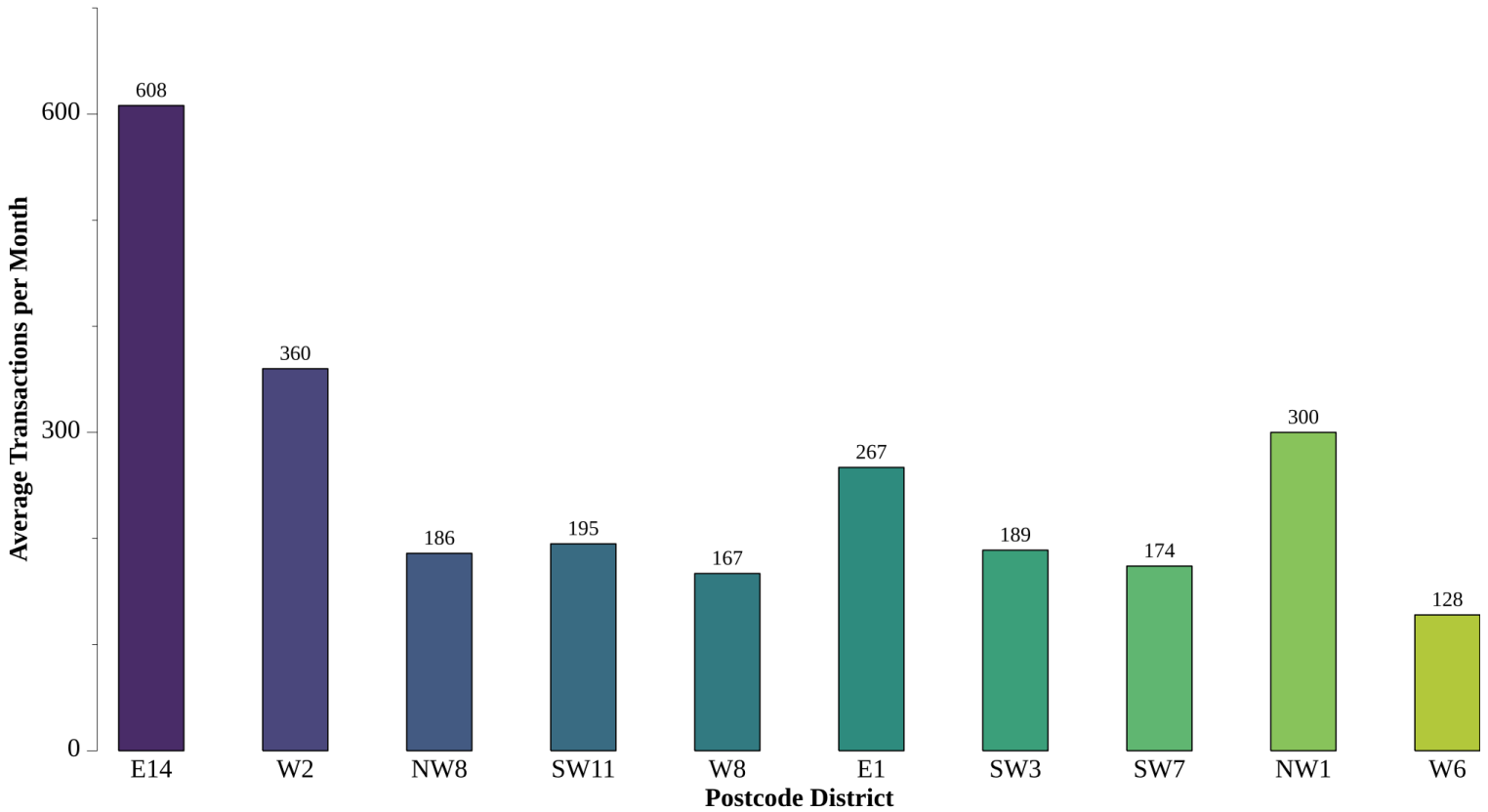
The following analysis provides an overview of the rental market in several postcode districts for December 2025.

Total Properties for Rent in Top 10 Districts - December 2025



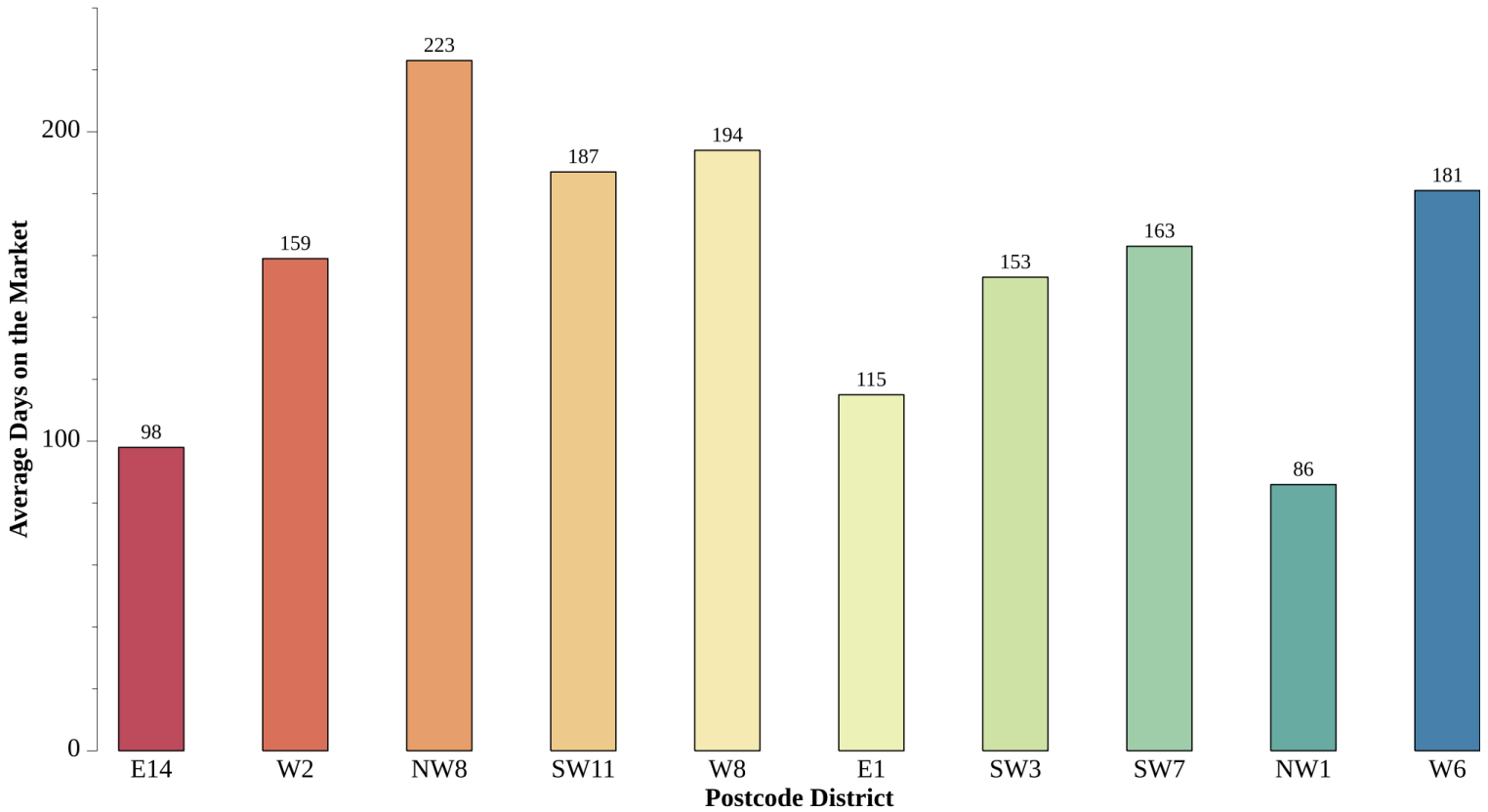
December's rental market is being shaped more by price alignment than pure supply. E14 and E1 remain landlord-led despite large inventories because mid-range rents keep turnover steady even in winter. In contrast, prime areas like W8, SW7 and NW8 show weaker leverage than their rents suggest, with big gaps between mean and median pointing to luxury listings skewing prices while most tenants transact lower. Overall, momentum favours landlords who adjust to seasonal demand, not those waiting for peak-season tenants.

Average Transactions per Month in Top 10 Districts - December 2025



Postcode District	Turnover (%) per Month
E14	37
W2	23
NW8	16
SW11	19
W8	19
E1	31
SW3	24
SW7	22
NW1	42
W6	20

Average Days on the Market in Top 10 Districts - December 2025

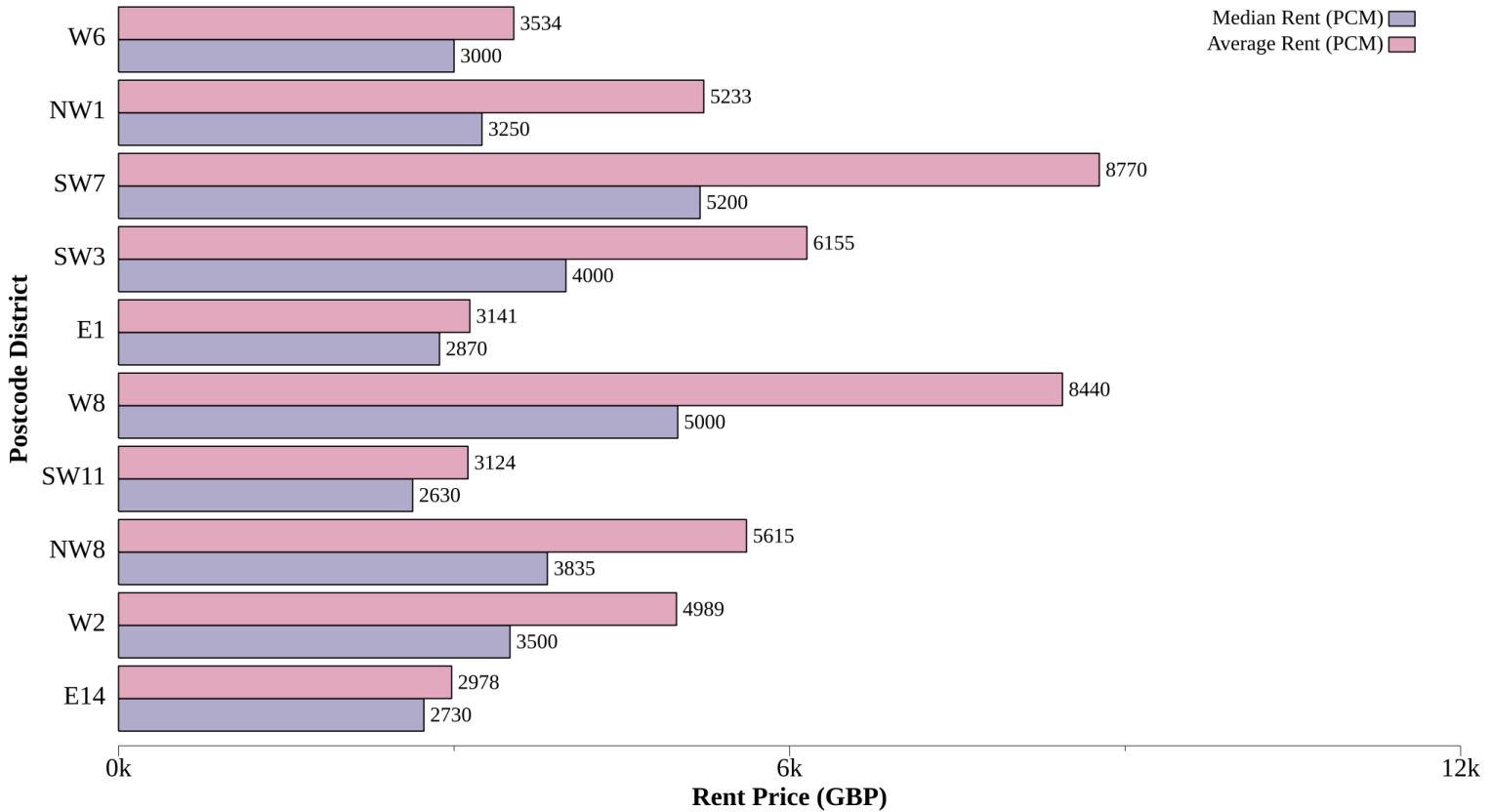


Postcode District	Months of Inventory
E14	2.7
W2	4.4
NW8	6.2
SW11	5.2
W8	5.4
E1	3.2
SW3	4.2
SW7	4.5
NW1	2.4
W6	5

Average & Median Prices Analysis

The following analysis provides an overview of the rental market in several postcode districts for December 2025.

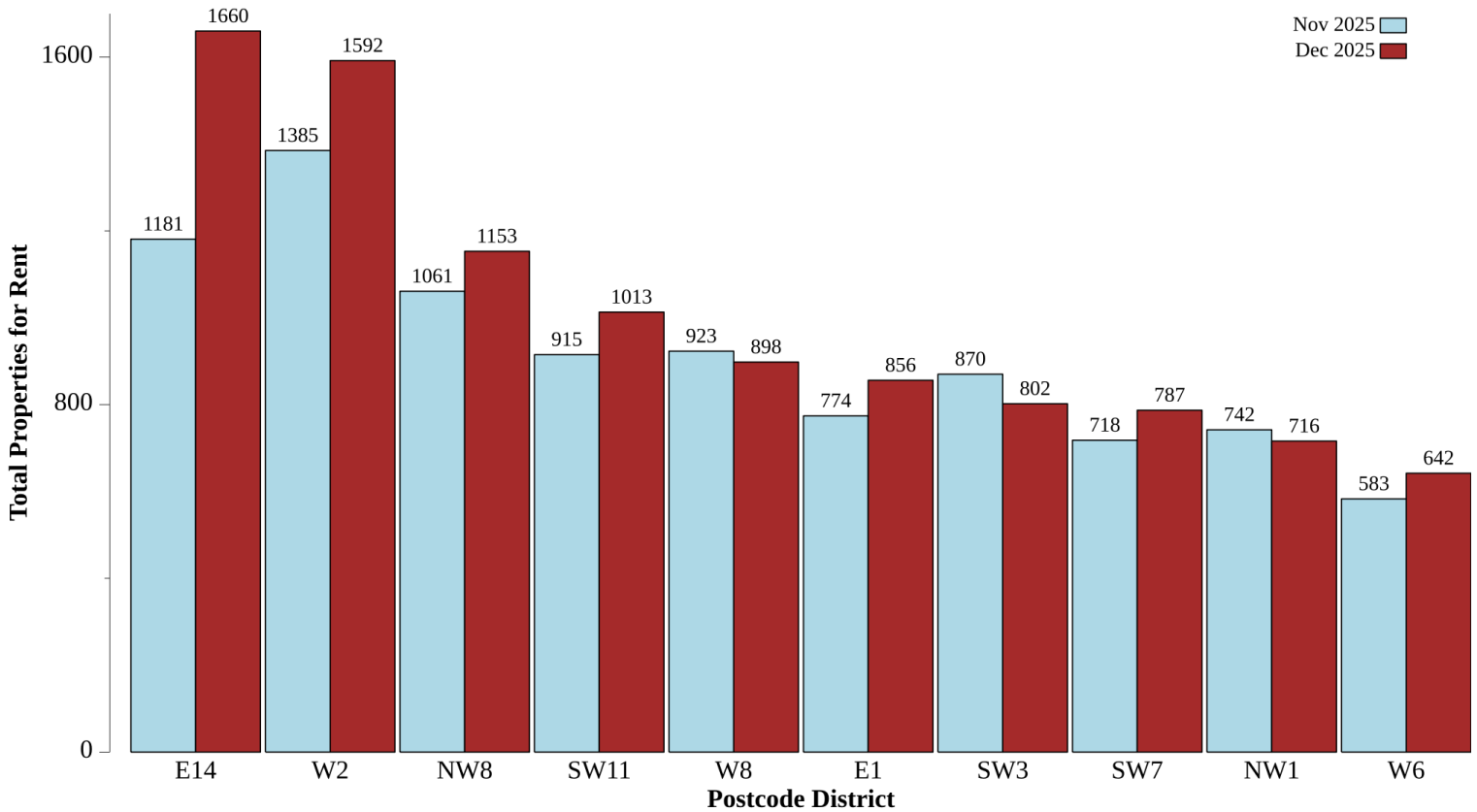
Average and Median Rent Prices (December 2025)



December rental data shows a clear split between asking rents and what the market actually clears at. Prime areas like W8, SW7, NW8 and SW3 have wide mean, median gaps, showing headline rents are propped up by a few high-end listings while most homes let lower and more slowly in winter. In contrast, E14, E1 and NW1 have tight price spreads with fast turnover, meaning rents are already aligned with real tenant budgets. This suggests winter isn't killing demand, but filtering it.

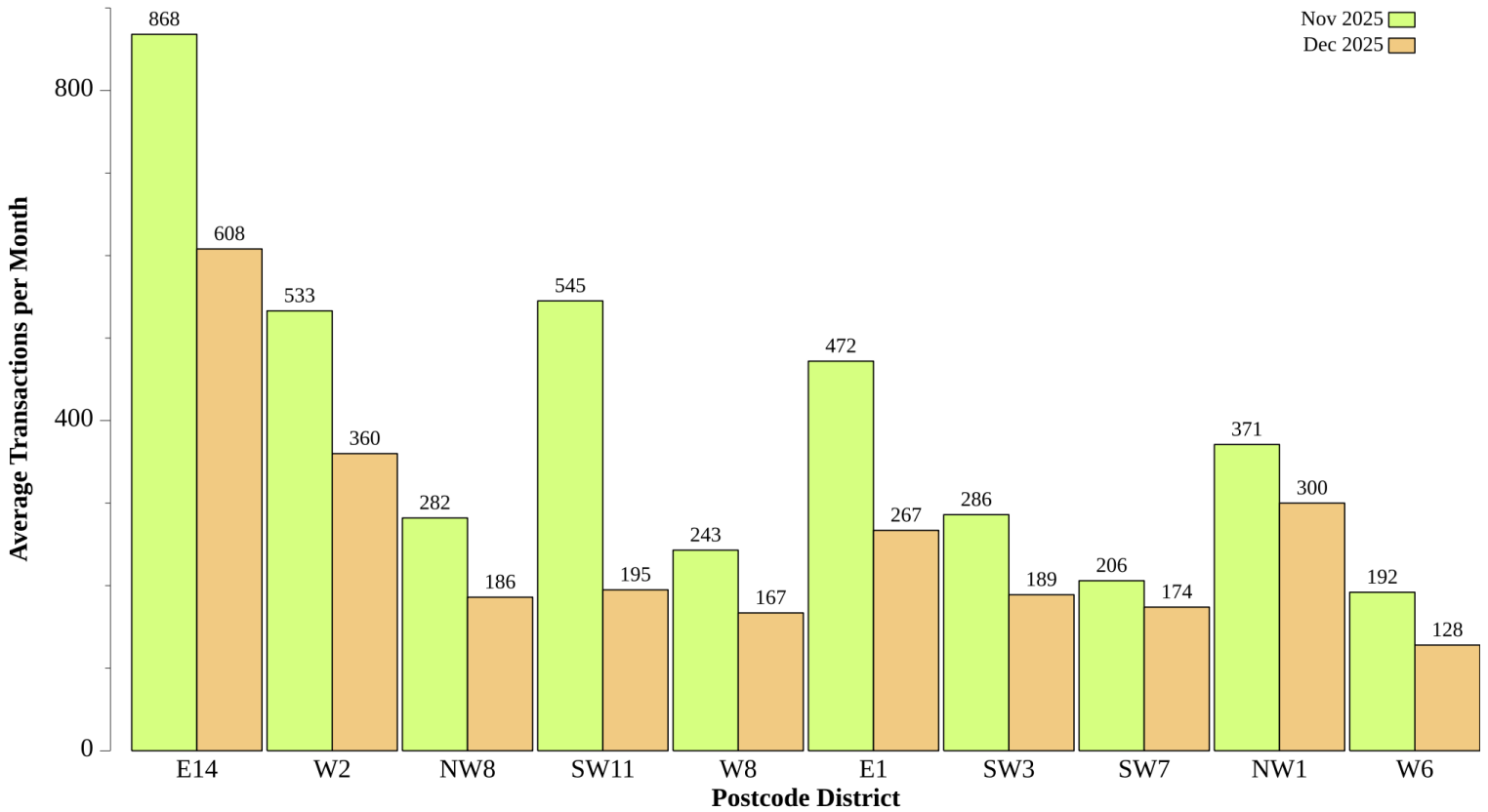
Comparison: Nov 2025 vs Dec 2025

Comparison of Properties for Rent in Top 10 Districts - November 2025 vs December 2025

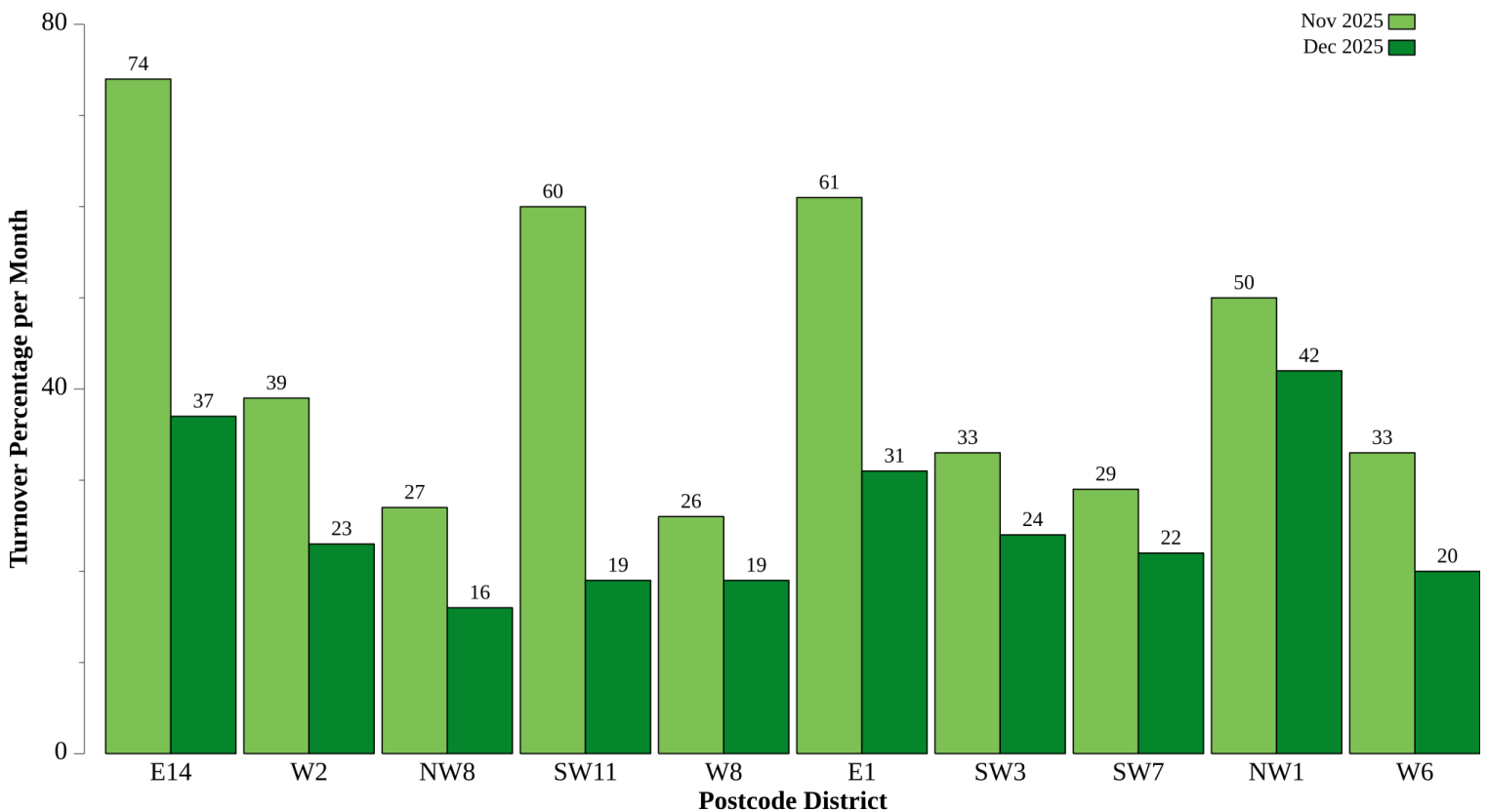


Across districts, the shift from November to December shows winter acting less as a demand freeze and more as a demand filter. Supply rises almost everywhere in December, but transactions fall sharply, meaning listings are carrying over rather than being absorbed. This is most visible in volume markets like E14, SW11 and E1, where November's very high turnover drops by half or more in December, not because tenants disappear, but because urgency fades once academic moves, relocations and corporate lets are largely done.

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



Comparison of Turnover Percentage per Month in Top 10 Districts - November 2025 vs December 2025



Insights – December 2025

Market Trends and Dynamics

November's landlord-led momentum fades into December as supply rises faster than deals close, especially in higher-rent districts. The key shift isn't collapsing demand, but demand becoming selective: volume-driven areas (E14, E1, NW1) retain landlord power, while prime zones lose pricing leverage as winter filters out discretionary renters.

Market Fluctuations and Variability

The sharpest winter adjustment shows up where mean rents fall faster than medians (W2, W8, NW8, SW7), signalling top-end rents correcting while core demand holds. Rising months of inventory and longer days on market reveal not volatility, but a widening gap between "aspirational listings" and rents that actually clear in-season.

Market Possibilities and Opportunities

Districts that stayed landlord-led despite December slowdowns (E14, E1, NW1) highlight where rental demand is structural, not seasonal, ideal for stable yield strategies. Meanwhile, prime markets shifting to balanced or tenant-led conditions offer timing-driven entry points, where spring recovery is likely but winter pricing discipline can unlock value.