



**scansan**

# **Analytical Report**

Rent Market Analysis (July, 2025)

Greater London

Intelligence Team

## Overview

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

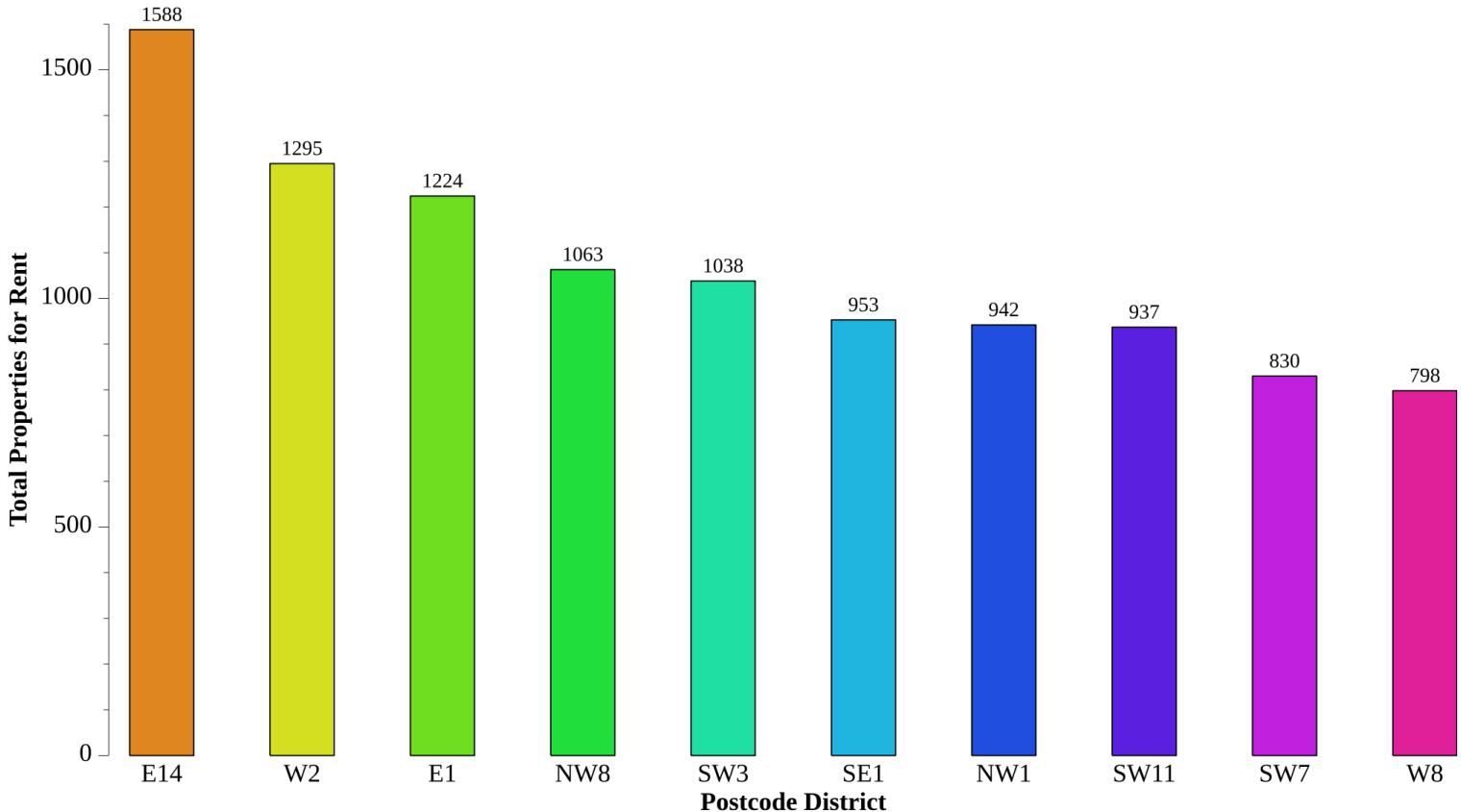
## Key Metrics

- 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

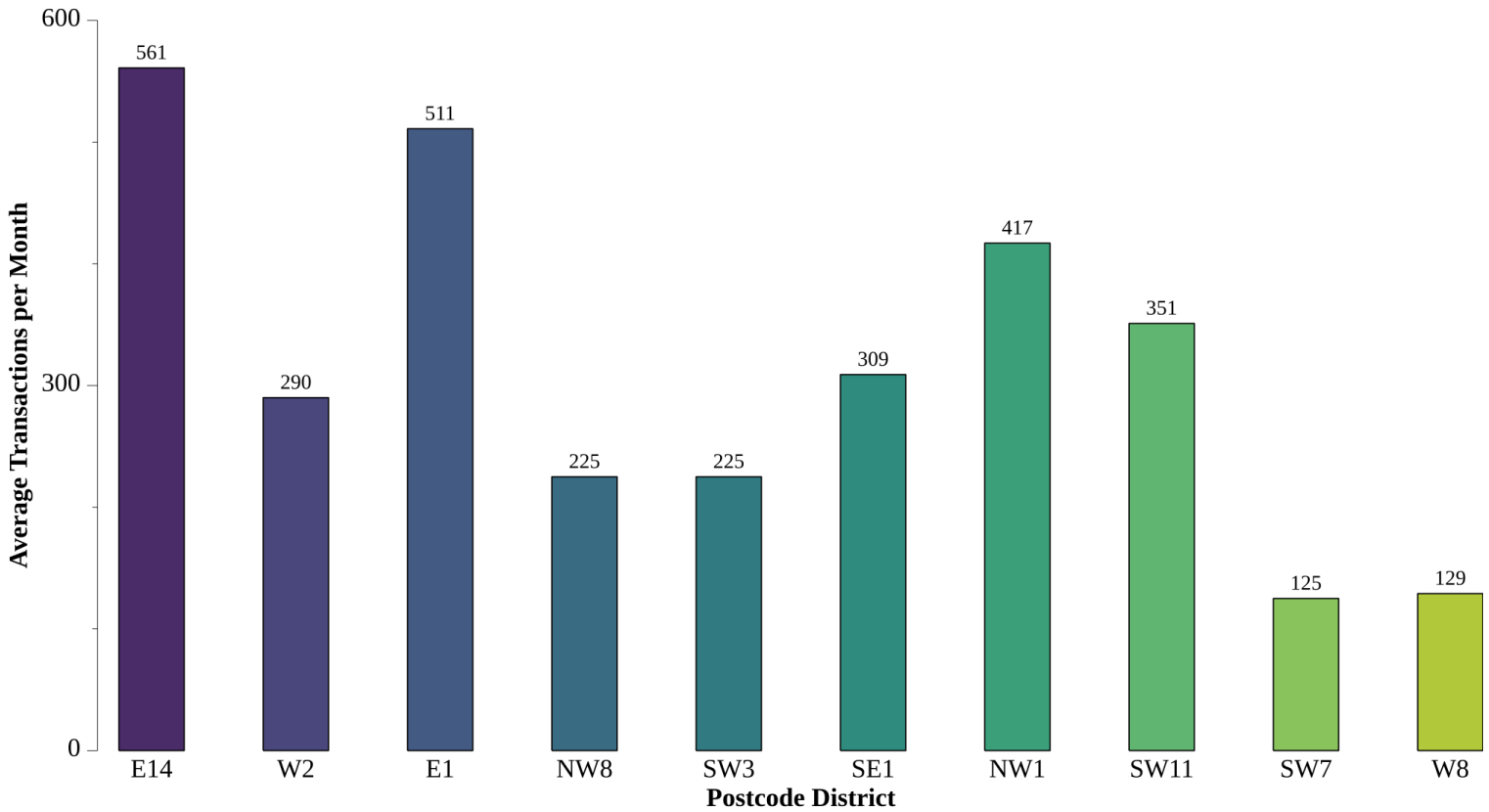
The following analysis provides an overview of the rental market in several postcode districts for July 2025.

Total Properties for Rent in Top 10 Districts - July 2025



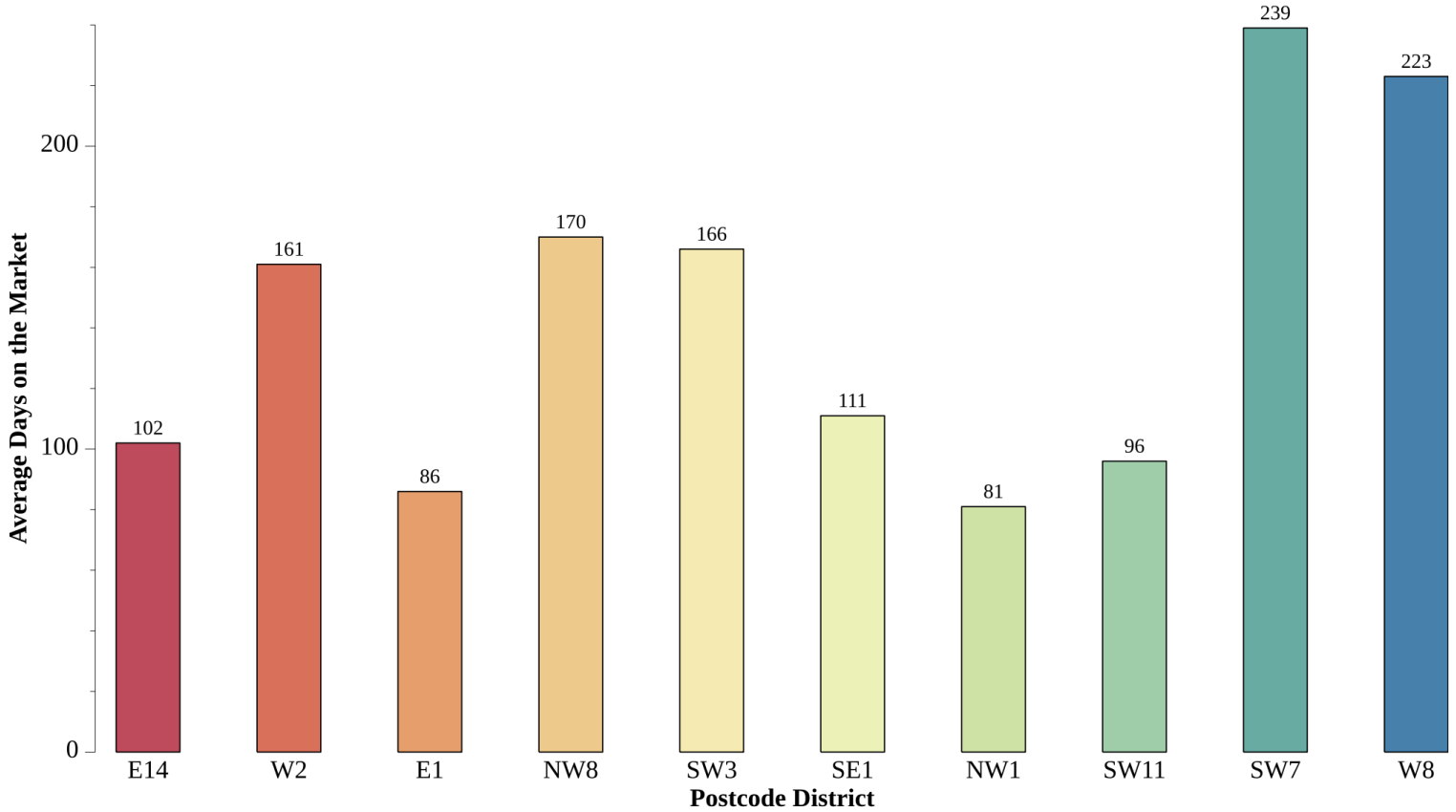
Despite high rent levels, premium districts like SW7 and W8 are clearly shifting in favour of tenants. Longer listing times, rising inventory, and fewer new listings suggest demand is cooling at the top end. In contrast, areas like E1, NW1, and SW11, while not the cheapest, strongly favour landlords, with fast turnover, tight supply, and steady listing activity. This points to renters gravitating toward central, better value areas, creating pressure in mid-tier markets while ultra prime zones appear overpriced or saturated.

### Average Transactions per Month in Top 10 Districts - July 2025



Postcode District	Turnover (%) per Month
E14	35
W2	22
E1	42
NW8	21
SW3	22
SE1	32
NW1	44
SW11	38
SW7	15
W8	16

### Average Days on the Market in Top 10 Districts - July 2025

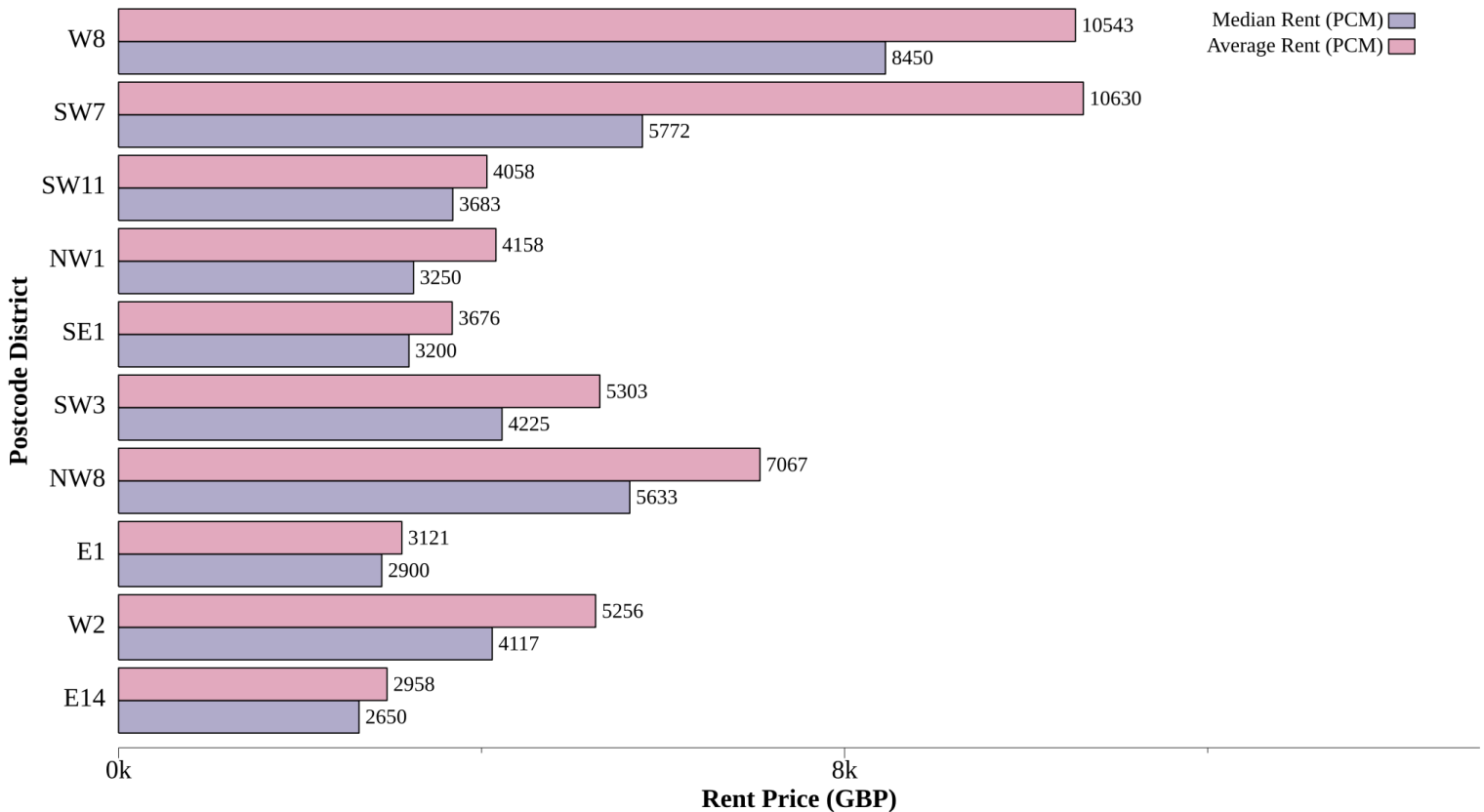


Postcode District	Months of Inventory
E14	2.8
W2	4.5
E1	2.4
NW8	4.7
SW3	4.6
SE1	3.1
NW1	2.3
SW11	2.7
SW7	6.6
W8	6.2

## Average & Median Prices Analysis

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

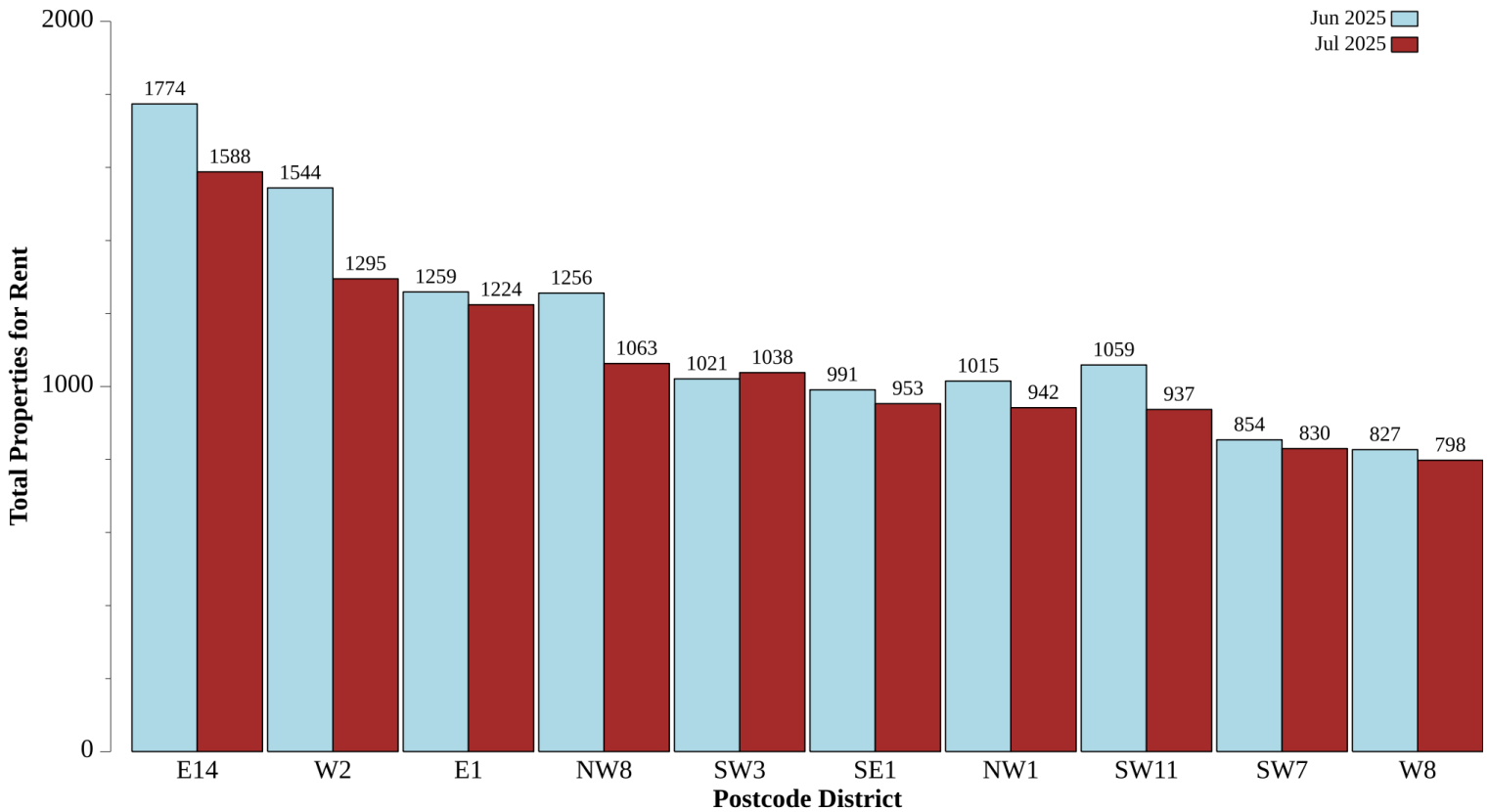
Average and Median Rent Prices (July 2025)



The July 2025 rental market shows a growing disconnect between high asking prices and actual tenant demand. In expensive areas like W8 and SW7, skewed averages and long days on market reveal that luxury listings are lingering, with few takers. Meanwhile, mid-rent districts like E1, NW1, and SW11 are seeing quicker lettings and tighter price spreads, signs that renters are prioritizing value and livability over prestige. This hints at a broader shift: renters are growing more selective, and only realistically priced, well-located properties are moving fast.

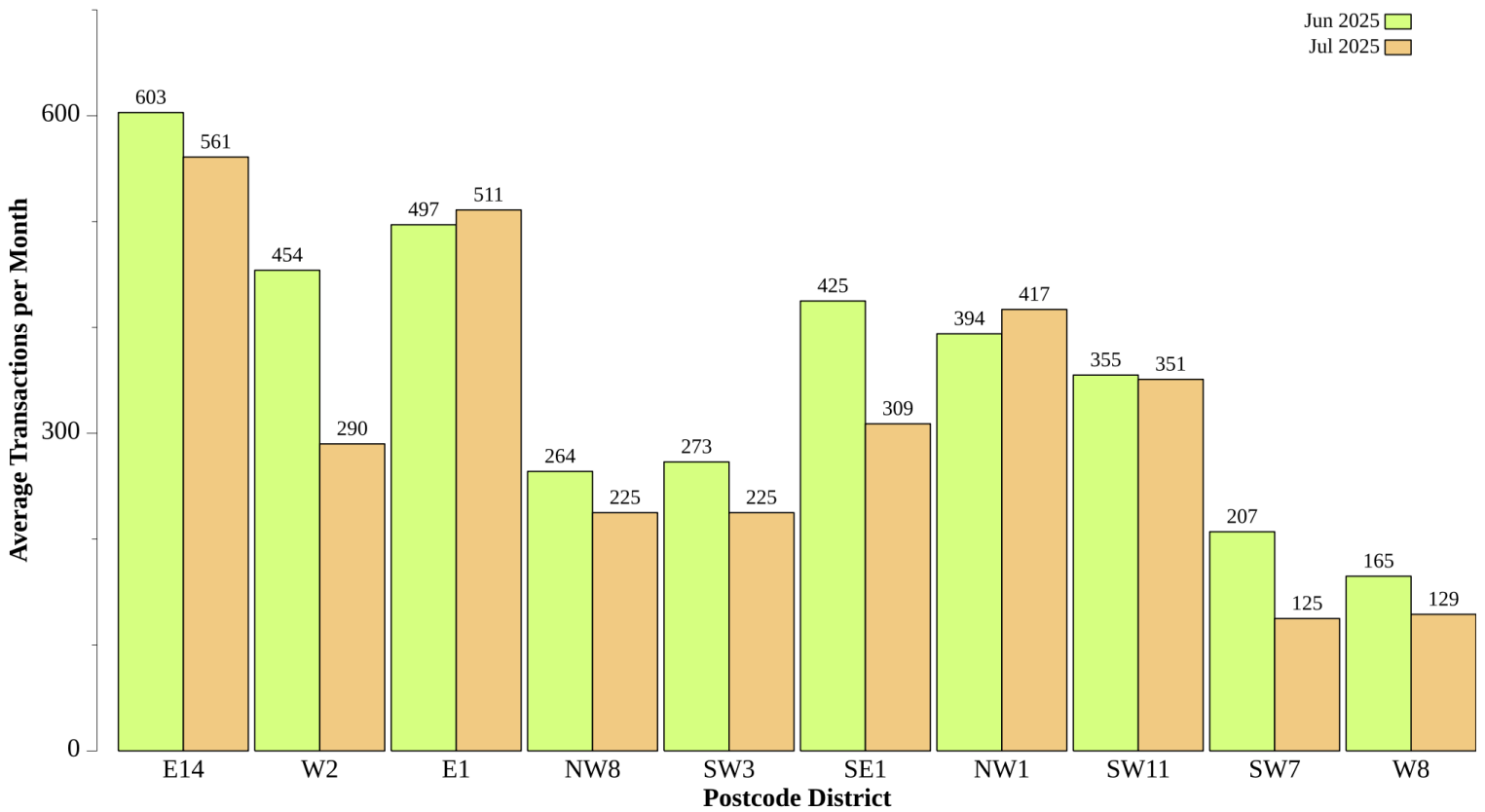
## Comparison: Jun 2025 vs Jul 2025

Comparison of Properties for Rent in Top 10 Districts - June 2025 vs July 2025

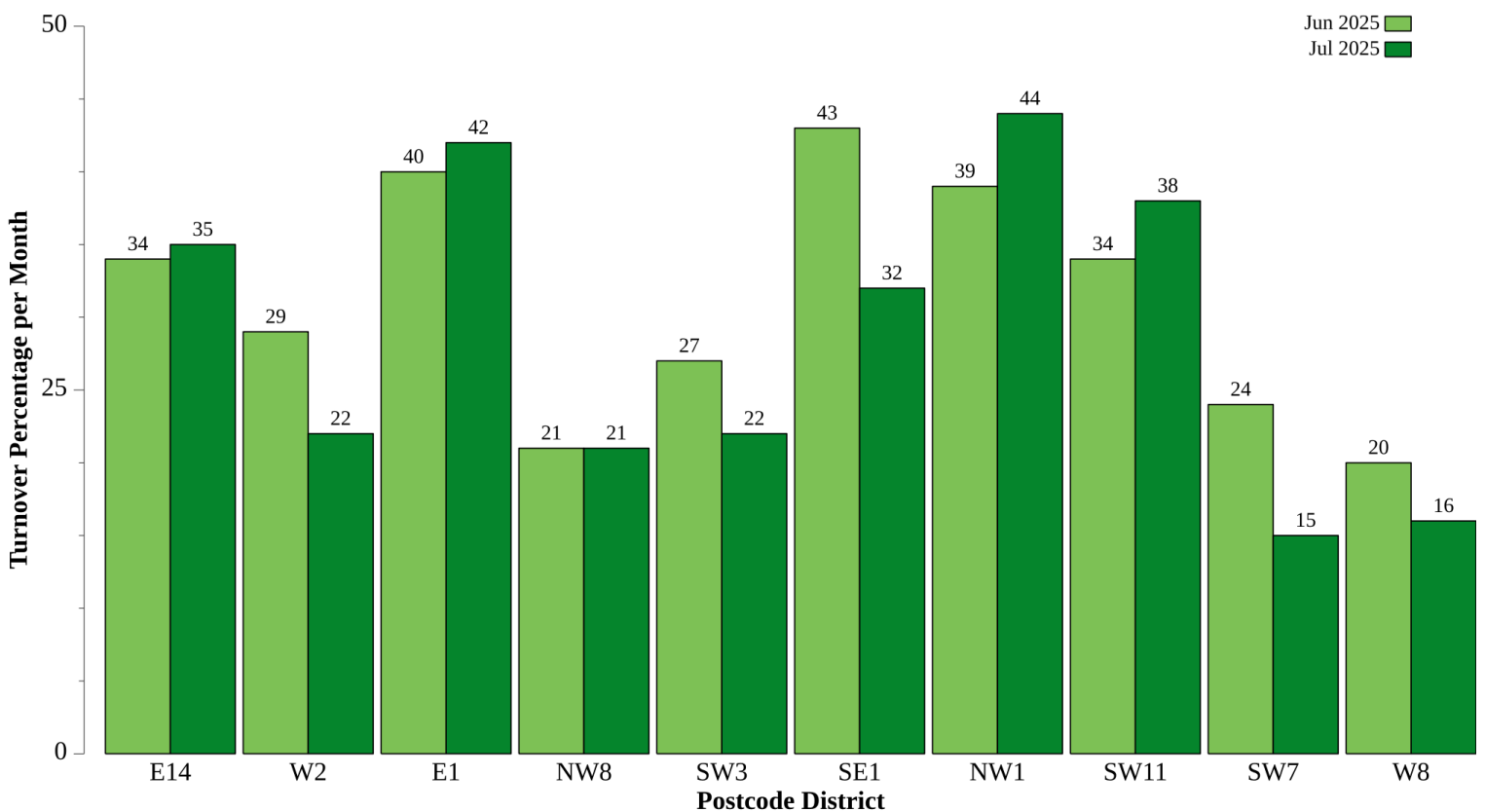


The shift from June to July 2025 reveals a quiet but telling movement in renter behavior. While supply declined across most districts, only select areas like E1 and NW1 saw rising turnover and transactions, suggesting that demand there is not just steady, but increasingly selective and location driven. In contrast, high end zones like W8 and SW7 witnessed sharp drops in turnover, confirming that steep prices are pushing renters to reconsider value. The growing mismatch between available stock and rental absorption hints at softening urgency in premium areas, while mid market zones continue to churn inventory at a healthy pace.

Comparison of Average Transaction per Month in Top 10 Districts - June 2025 vs July 2025



Comparison of Turnover Percentage per Month in Top 10 Districts - June 2025 vs July 2025



## Insights – July 2025

### Market Trends and Dynamics

While many districts still sit under a landlord-friendly label, the nature of control is subtly shifting. The overall drop in available rentals isn't simply supply shrinking, it's more about properties sitting longer, even when supply falls. High-demand zones like E1 and NW1 manage to absorb listings faster, suggesting renters are zoning in on convenience, value, or better transit. In contrast, expensive pockets such as SW7 and W8 are seeing rising inventory outpace demand, even with fewer listings. This suggests a market where pricing power is no longer tied to prestige but to perceived worth.

### Market Fluctuations and Variability

On the surface, rent prices seem to move up or down marginally, but deeper, they're testing limits. In mid-market zones like SW11 and NW1, small dips in rent reflect not weakness but strategic moderation, landlords keeping units moving by staying just below psychological price ceilings. Meanwhile, in high end areas like SW7, even rising rents haven't stopped market cooling, proving that price hikes don't equal pricing power. Some areas also show growing divergence between mean and median rents, suggesting that top-tier units are failing to lease, dragging up the average while bulk of the activity is happening in the middle. This hints at renters rejecting flash in favor of function.

## Market Possibilities and Opportunities

July's market holds subtle openings for both renters and landlords, but only for those reading between the lines. For landlords in high turnover, fast moving areas like E14 and E1, the game is about staying agile, pricing correctly and moving quickly. But for renters, the best chances lie where prestige and pricing no longer align. W8, SW7, and SW3 are gradually slipping into tenant-friendly territory, with longer days on market and growing unsold stock. This quiet shift creates space to negotiate, especially for longer leases or units with less competitive appeal. The real opportunity lies in the mismatch between perception and current demand, landlords stuck in last year's pricing logic may be more open than they appear.