



# **Analytical Report**

Rent Market Analysis (August, 2025)

Greater London

Intelligence Team

## Overview

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

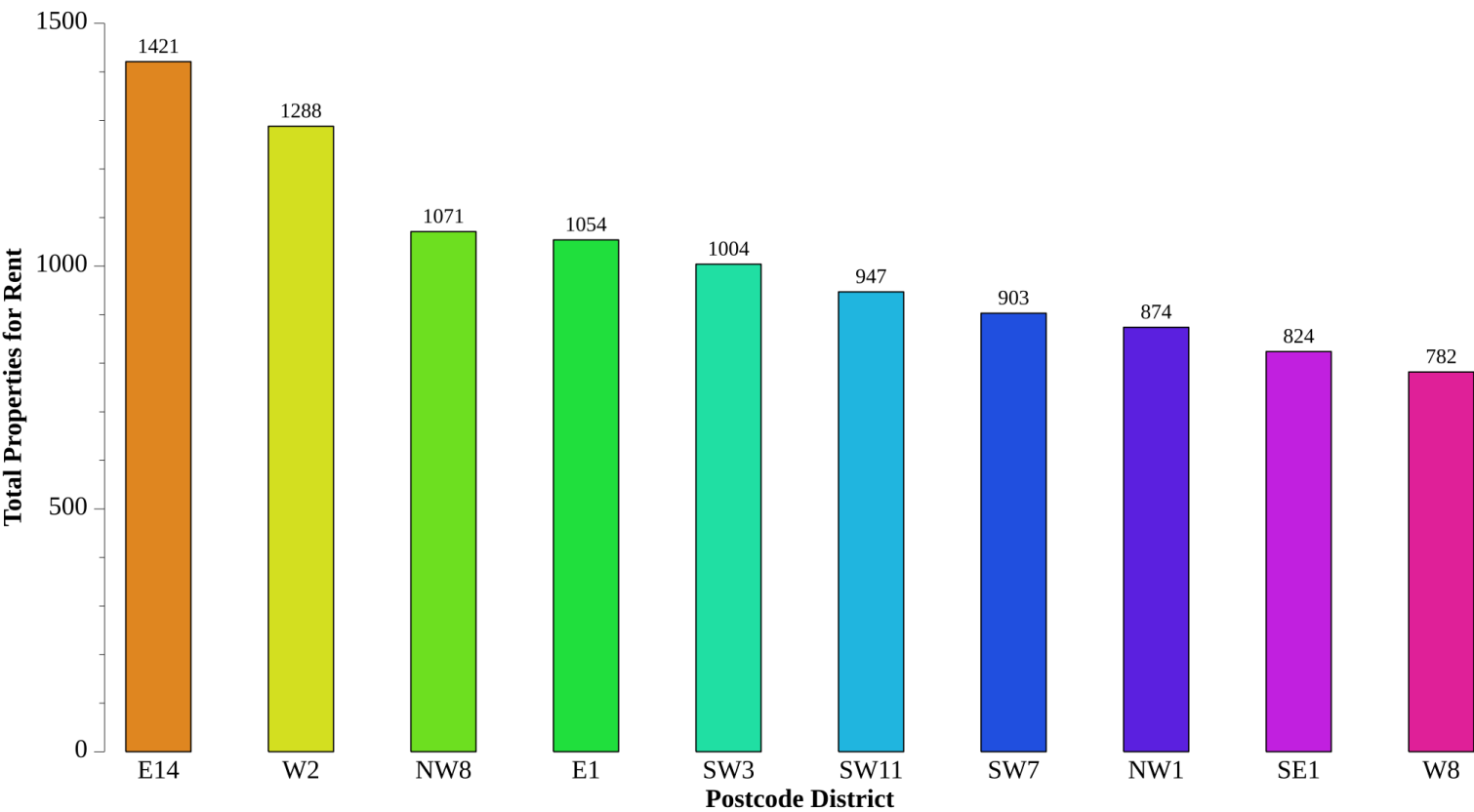
## Key Metrics

- 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

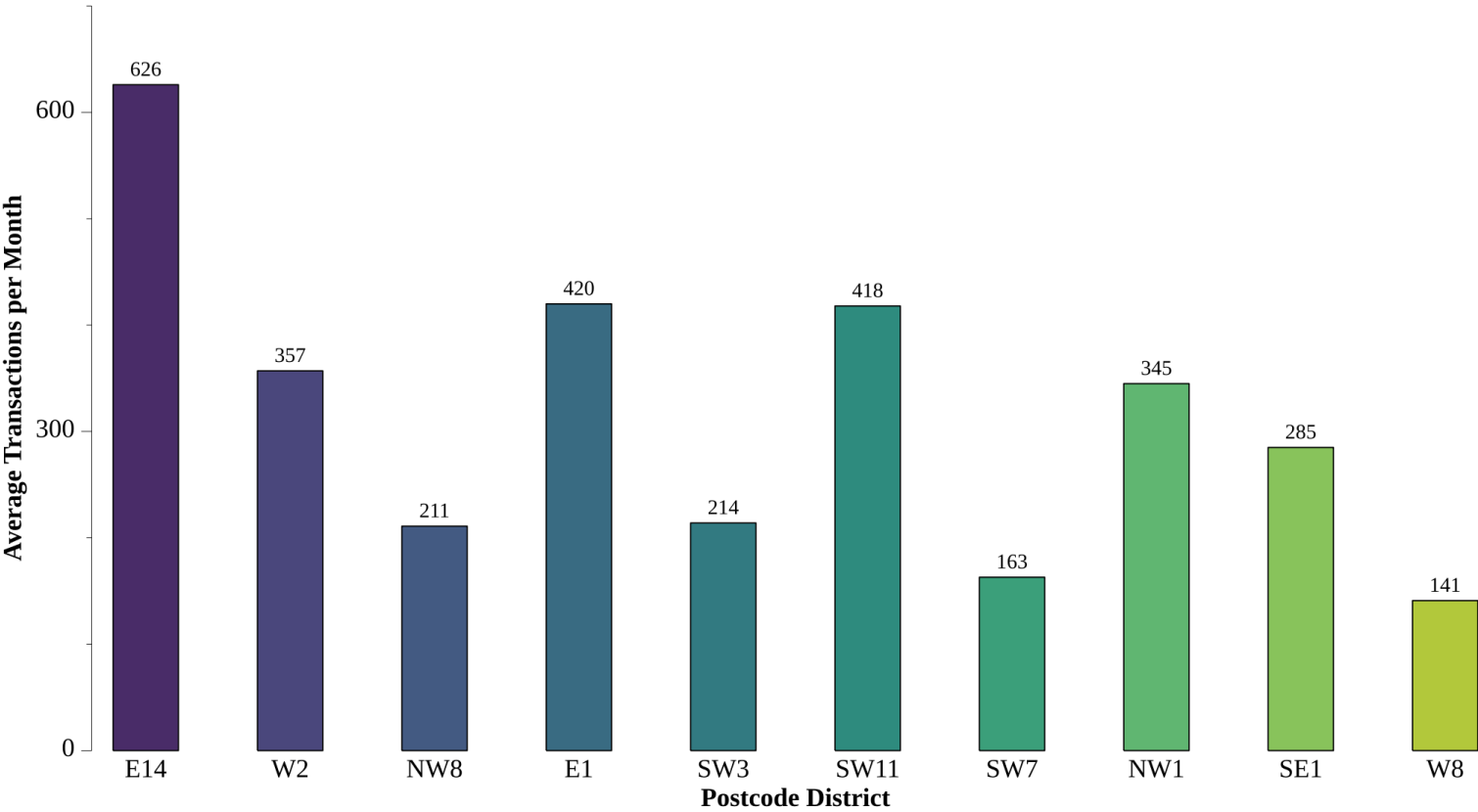
The following analysis provides an overview of the rental market in several postcode districts for August 2025.

Total Properties for Rent in Top 10 Districts - August 2025



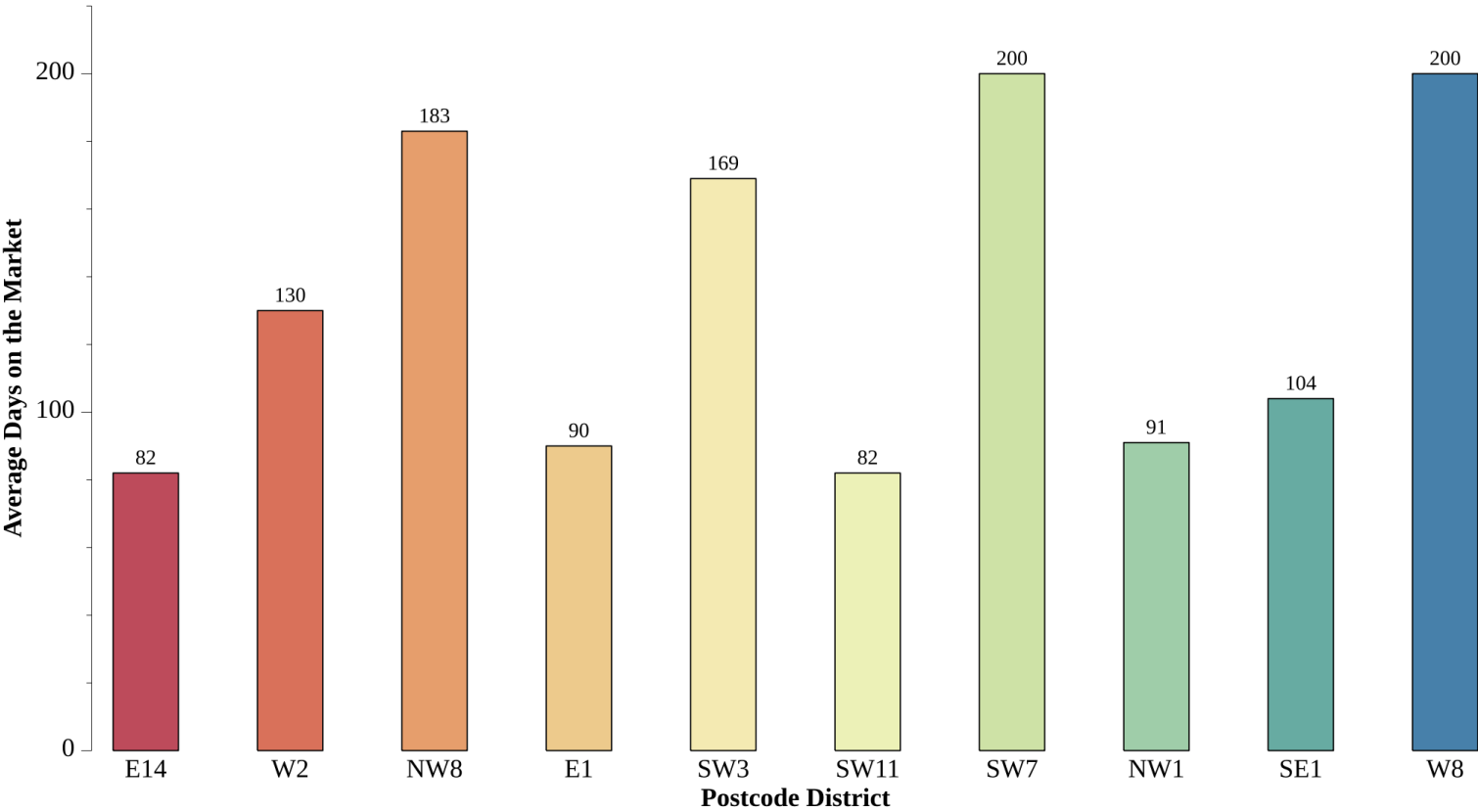
The rental market splits between landlord driven zones and balanced ones, but the real divide lies in how supply and demand play out. High volume areas like E14 and SW11 show landlords holding power as demand keeps rents firm, while ultra prime districts such as SW7 and W8, despite sky high rents, lean balanced as tenant resistance caps growth. Mid-tier markets like E1 and SE1 hit the sweet spot, affordable enough to attract demand yet strong enough to give landlords the edge.

Average Transactions per Month in Top 10 Districts - August 2025



Postcode District	Turnover (%) per Month
E14	44
W2	28
NW8	20
E1	40
SW3	21
SW11	44
SW7	18
NW1	39
SE1	34
W8	18

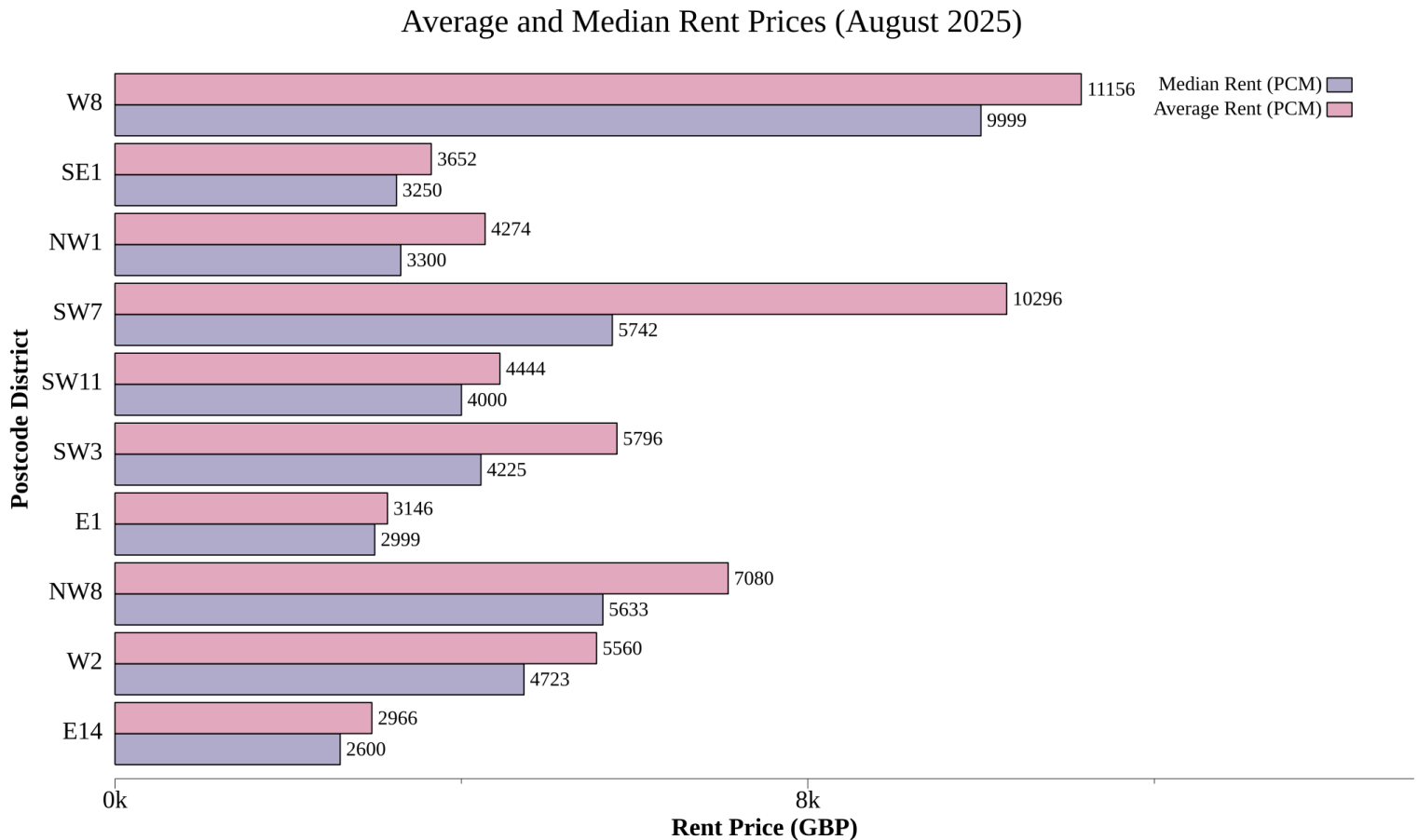
Average Days on the Market in Top 10 Districts - August 2025



Postcode District	Months of Inventory
E14	2.3
W2	3.6
NW8	5.1
E1	2.5
SW3	4.7
SW11	2.3
SW7	5.5
NW1	2.5
SE1	2.9
W8	5.6

## Average & Median Prices Analysis

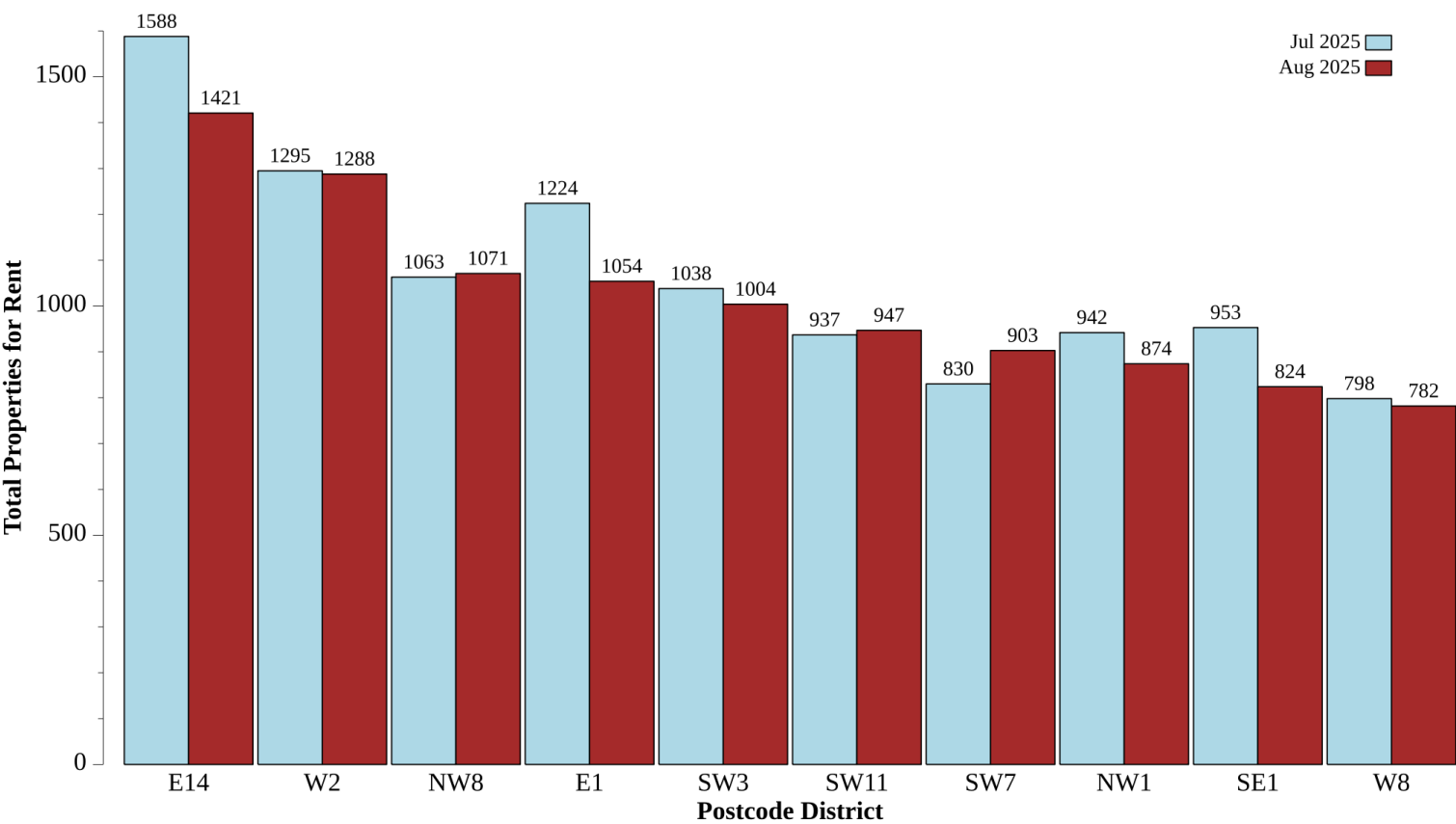
The following analysis provides an overview of the rental market in several postcode districts for August 2025.



Rents show a clear split between “workable” and “aspirational” pricing. Mid-range zones like E14 and E1 keep demand flowing, while ultra-prime areas like W8 and SW7 are pulled up by a few trophy rentals that most tenants won’t chase. Balanced markets like NW8 and SW3 signal limits to how far prices can be pushed, but in places like W2 and SW11, demand still pays a premium, keeping landlords firmly in control.

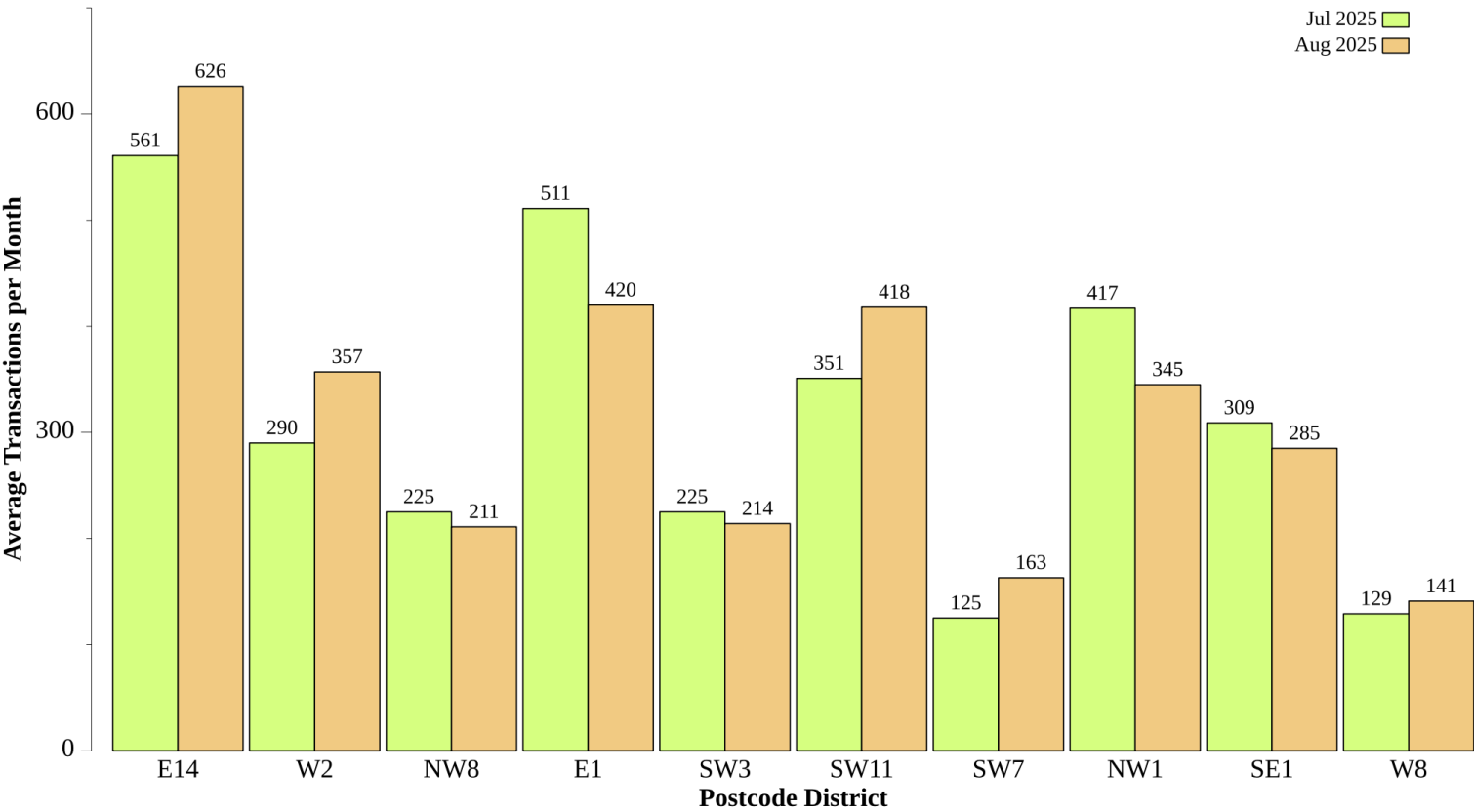
Comparison: Jul 2025 vs Aug 2025

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

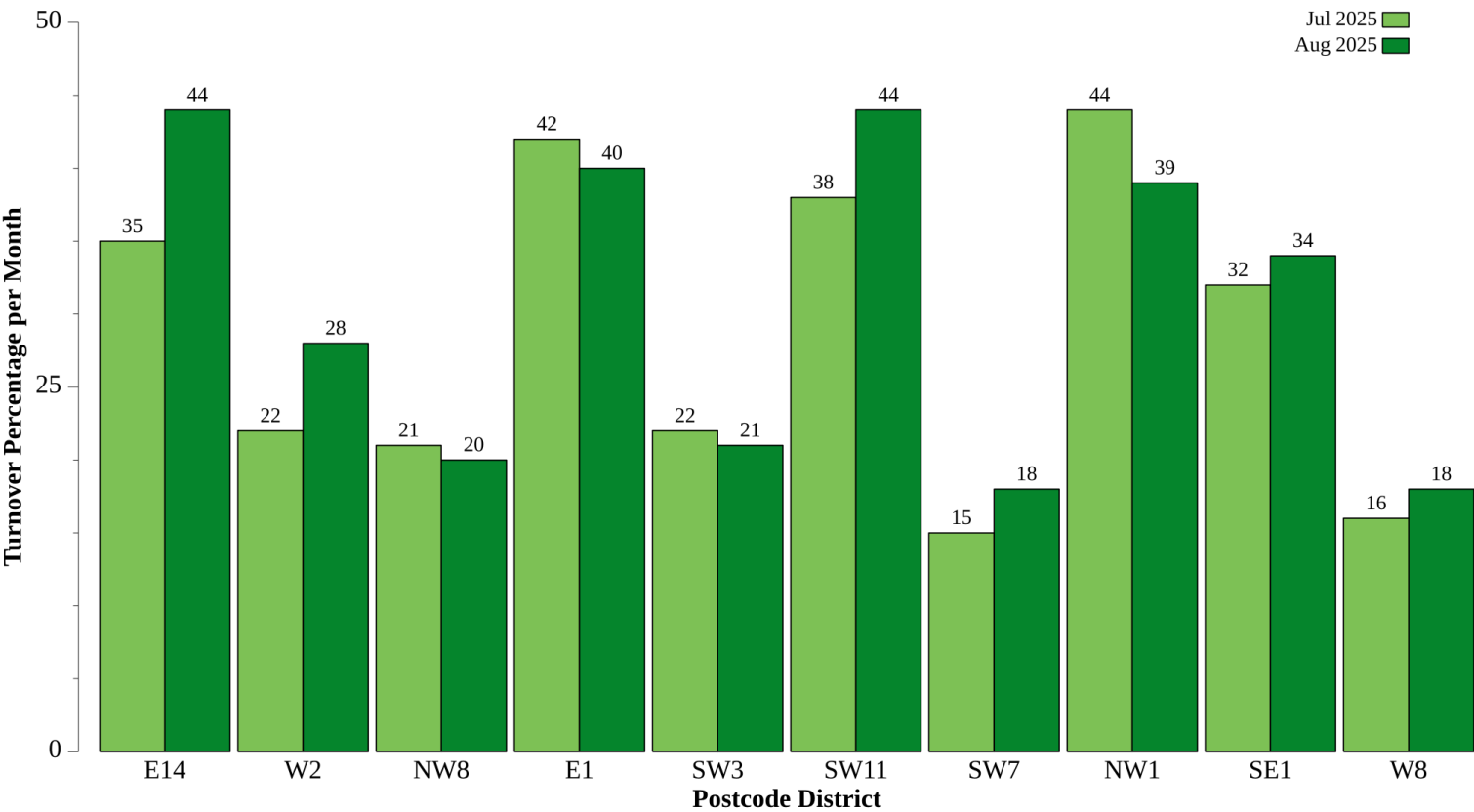


In August, E14 and SW11 show fewer listings but higher transactions and turnover, signaling intensified competition despite tighter supply. NW8 and SW3 remain stable, indicating saturated segments where listing changes barely impact activity. High-end areas like SW7 and W8 see modest turnover gains, showing selective luxury demand resilience. E1 and NW1, with declining listings and mixed transactions, hint at softening or recalibration. Overall, the data uncovers nuanced local rhythms: supply contractions fuel activity in some districts while others hover in equilibrium, reflecting micro-market dynamics rather than broad trends.

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



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





## **Insights – August 2025**

### Market Trends and Dynamics

The rental landscape shows a clear bifurcation, districts like E14, E1, SW11, and NW1 display high turnover and low months of inventory, signaling strong landlord control and fluid movement despite moderate rents. In contrast, luxury pockets like SW7, NW8, SW3, and W8 see slower turnover and longer days on market, reflecting selective, patient tenant behavior where pricing power is balanced by scarcity.

### Market Fluctuations and Variability

There's a hidden rhythm in market response: even within high-demand areas, median rents diverge sharply from mean rents, hinting at a mix of aspirational listings dragging averages up. Short-term influxes (last 14 days' listings of August) indicate spikes in supply that temporarily dampen or accelerate turnover, suggesting that small changes in listing cadence can disproportionately impact perceived activity.

### Market Possibilities and Opportunities

The contrast between fast-moving mid-tier districts and slower, high-end districts uncovers openings for strategic pricing adjustments. In landlord-favored zones, modest rent hikes can be absorbed without hurting occupancy, whereas in balanced markets, careful targeting of high-quality listings or bundling amenities could unlock latent demand. Essentially, understanding micro-market pace and rent skew offers

actionable levers for optimizing revenue and tenant retention.