



Analytical Report

Rent Market Analysis (November, 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 :

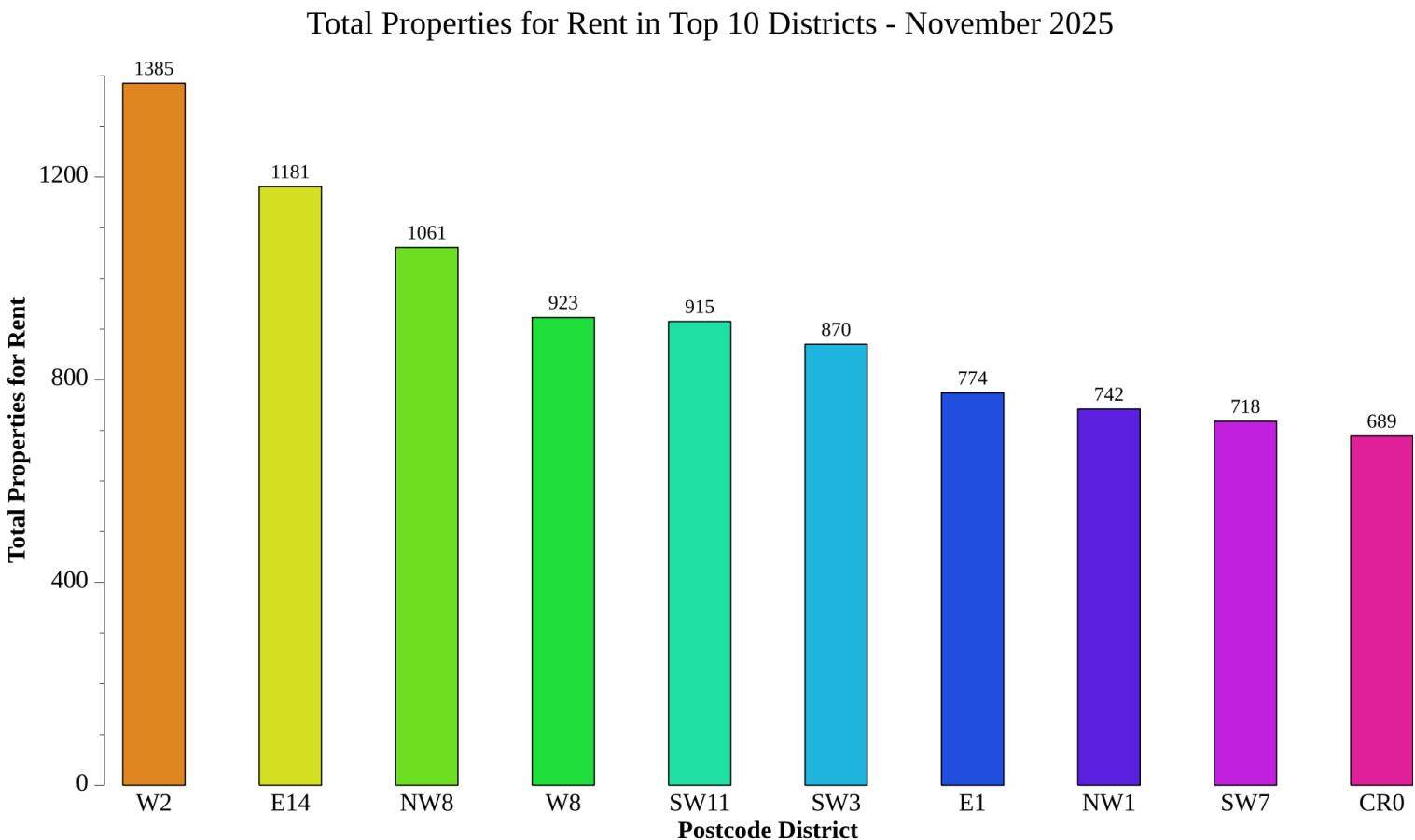
Market with approximately equal demand and supply.

- Tenants Market :

Market with high supply and less demand.

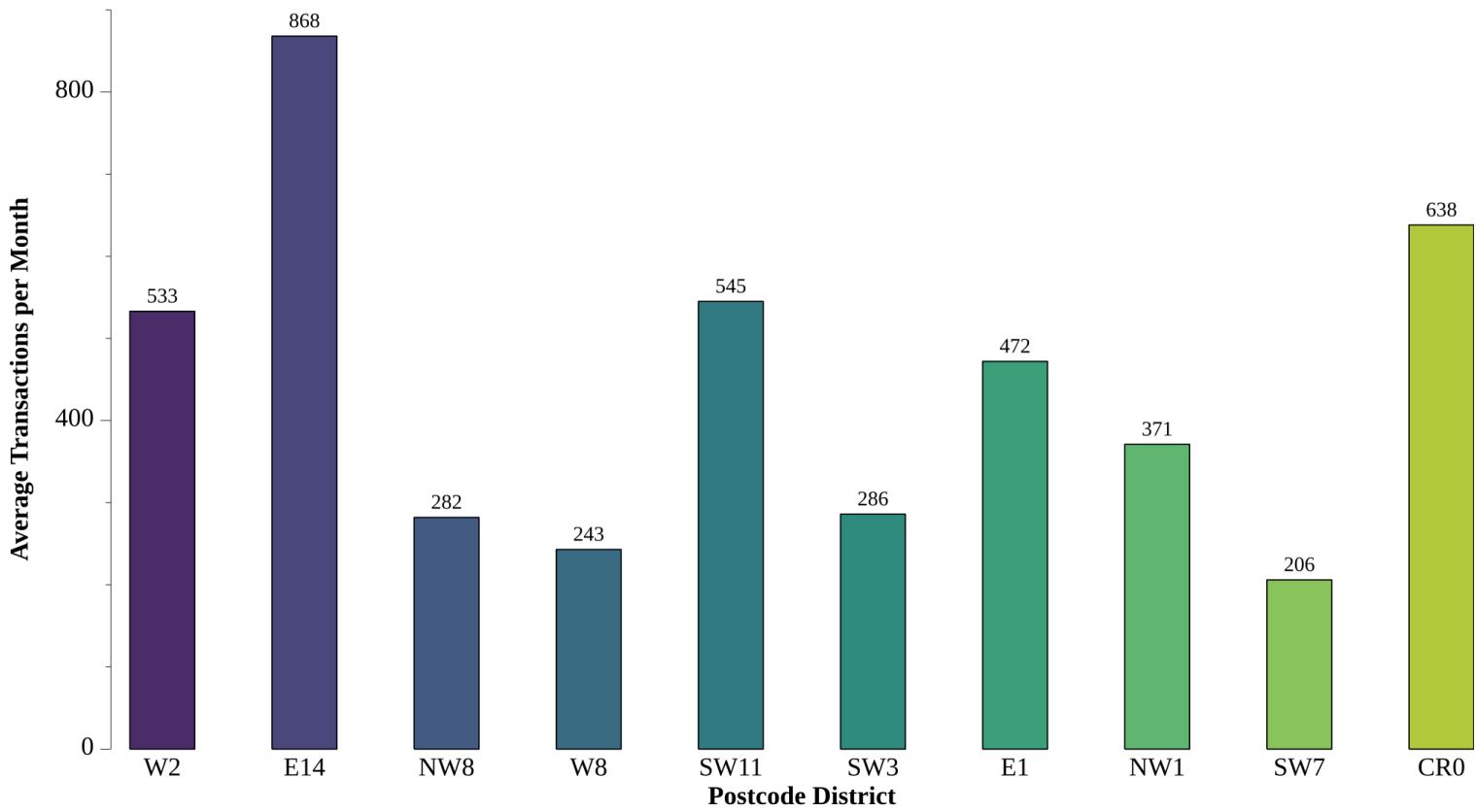
High-level Analysis

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



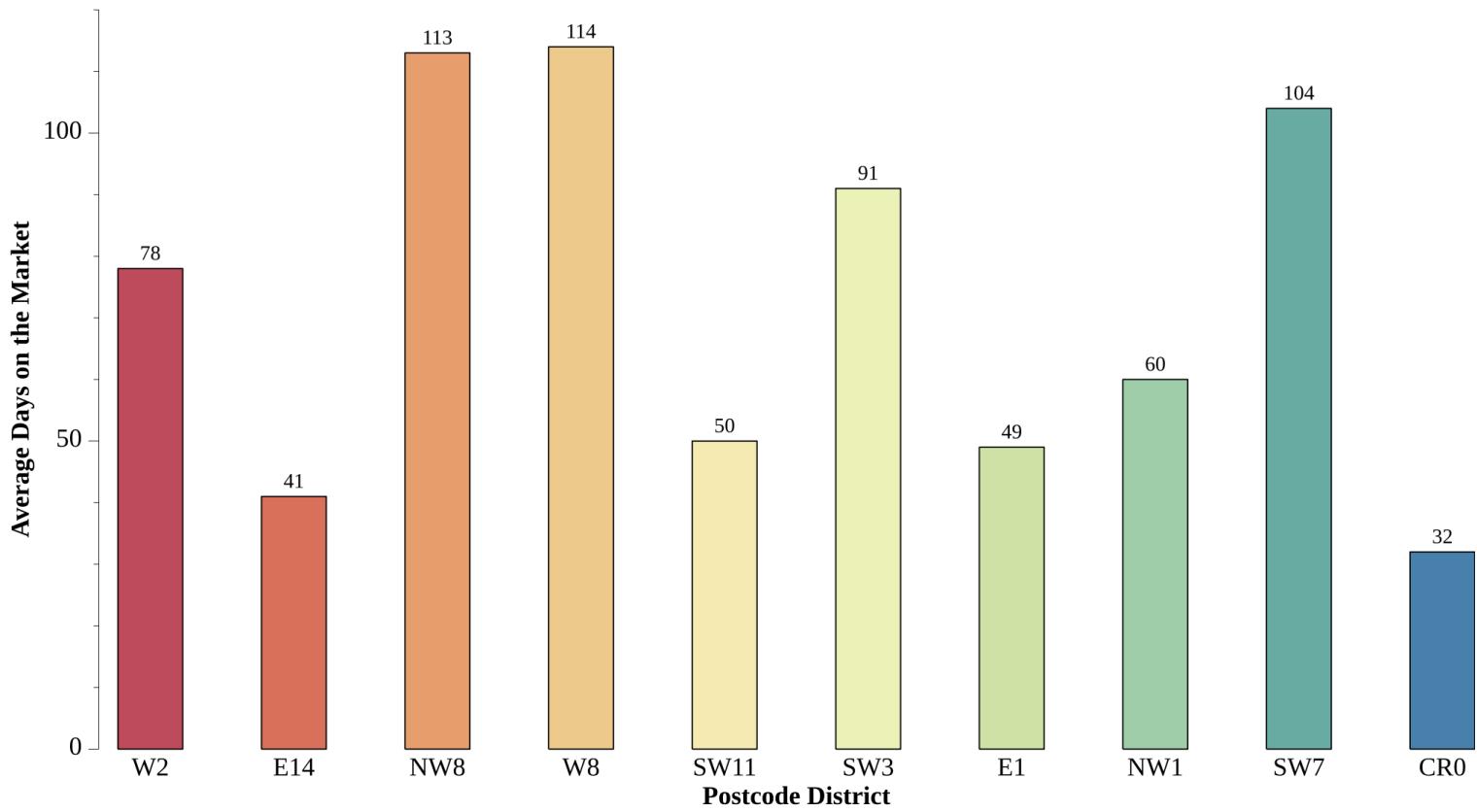
The rental market is clearly favoring landlords, but differently by price tier: high end areas (W8, SW7, NW8) move slowly despite high rents, showing limited but wealthy demand, while mid priced hubs (E14, E1, SW11, NW1) see fast turnover and short days-on-market, reflecting strong, broad renter demand. Affordable areas like CR0 flip the pattern entirely, with ultra quick turnover and minimal inventory, giving landlords maximum leverage. Overall, scarcity drives power in premium zones, while volume drives it in mainstream districts.

Average Transactions per Month in Top 10 Districts - November 2025



Postcode District	Turnover (%) per Month
W2	39
E14	74
NW8	27
W8	26
SW11	60
SW3	33
E1	61
NW1	50
SW7	29
CR0	93

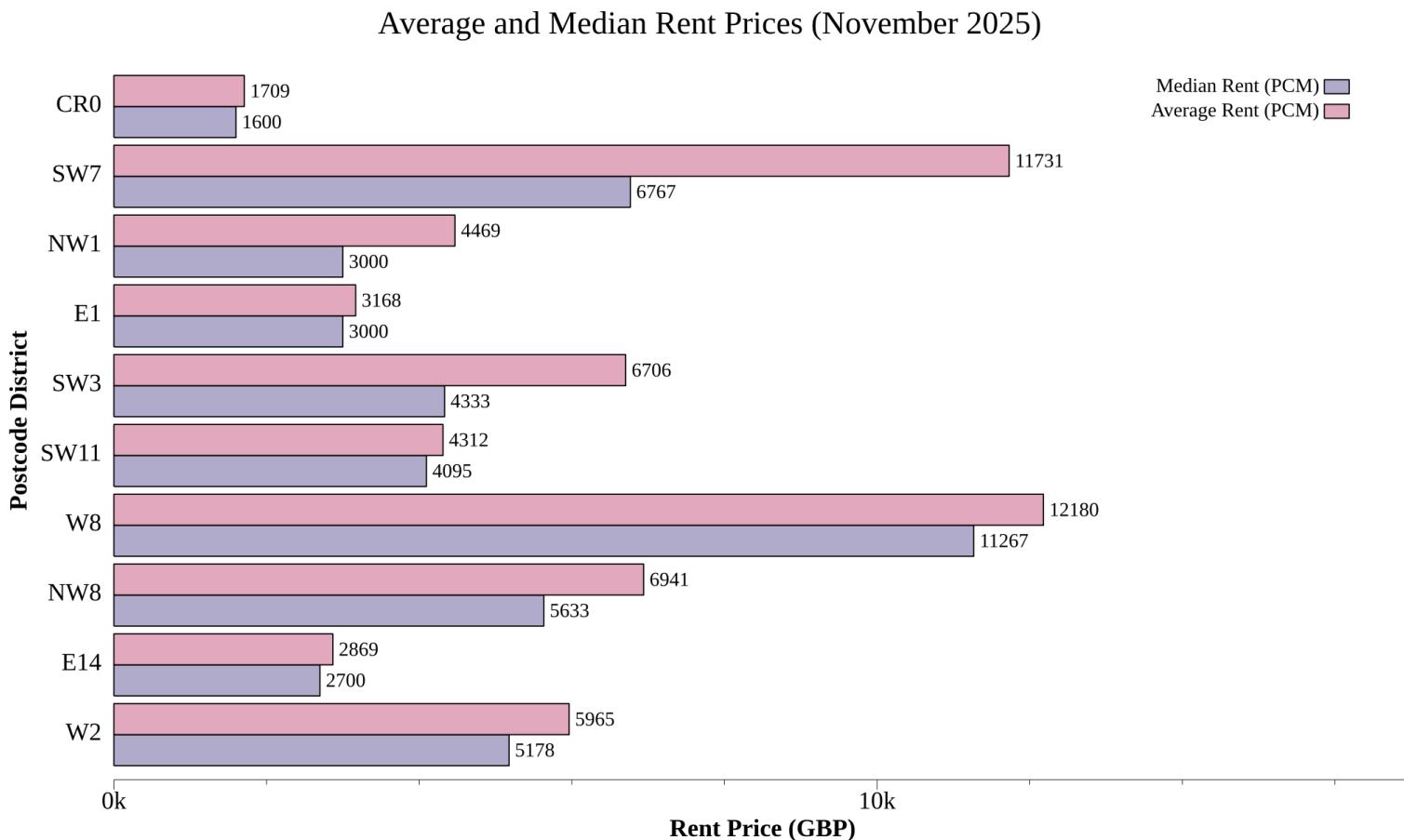
Average Days on the Market in Top 10 Districts - November 2025



Postcode District	Months of Inventory
W2	2.6
E14	1.4
NW8	3.8
W8	3.8
SW11	1.7
SW3	3
E1	1.6
NW1	2
SW7	3.5
CR0	1.1

Average & Median Prices Analysis

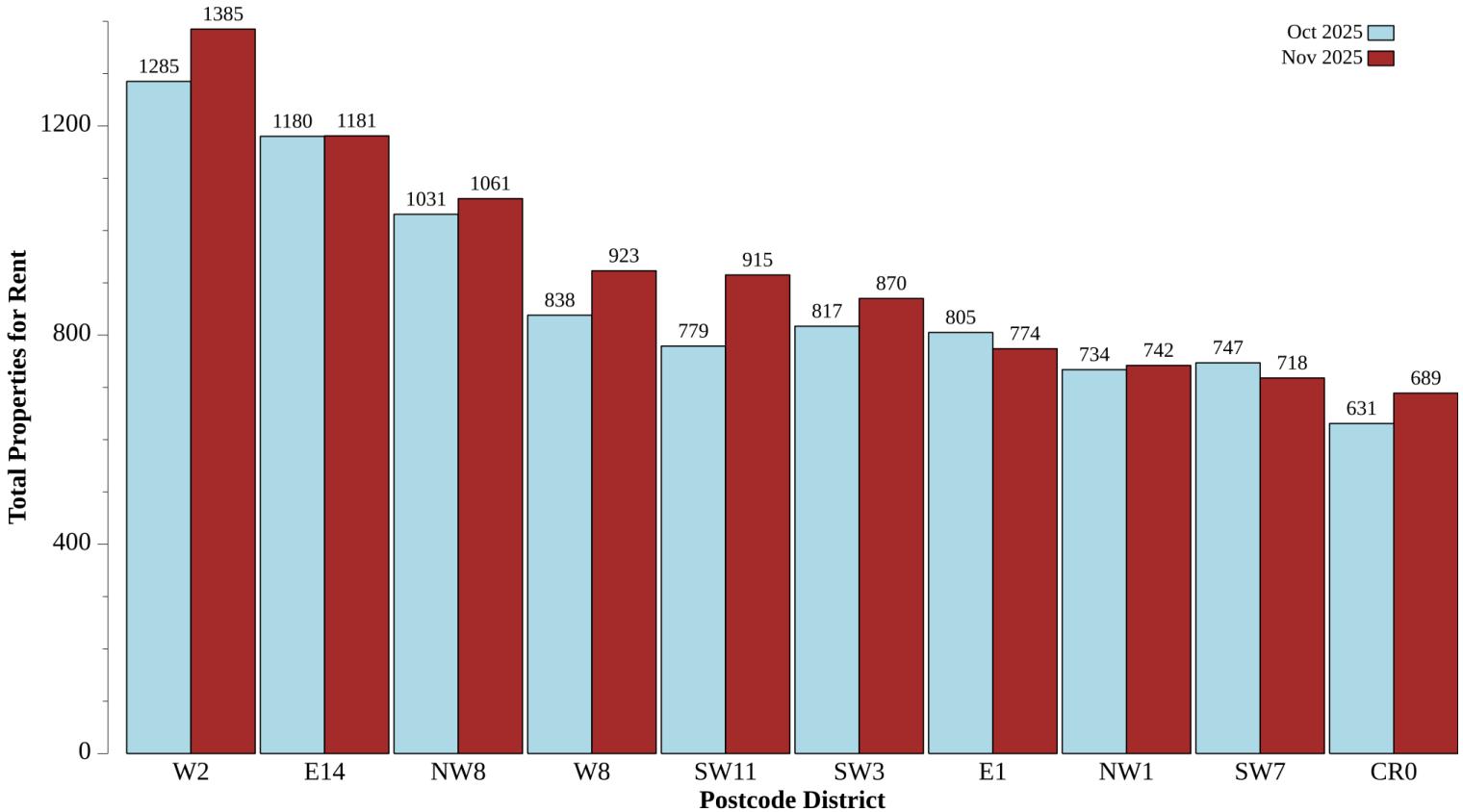
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Areas with a big gap between mean and median rents (like W8, SW7, NW8, SW3) are being propped up by a few ultra-luxury listings, leading to slower movement and higher inventory. In contrast, districts where mean closes median (E14, E1, SW11, NW1, CR0) have prices that match real renter budgets, which is why stock moves fast, turnover is high, and days-on-market are low. In short: large gaps signal top-heavy markets with slower demand, while tight gaps signal strong, broad renter demand and efficient pricing.

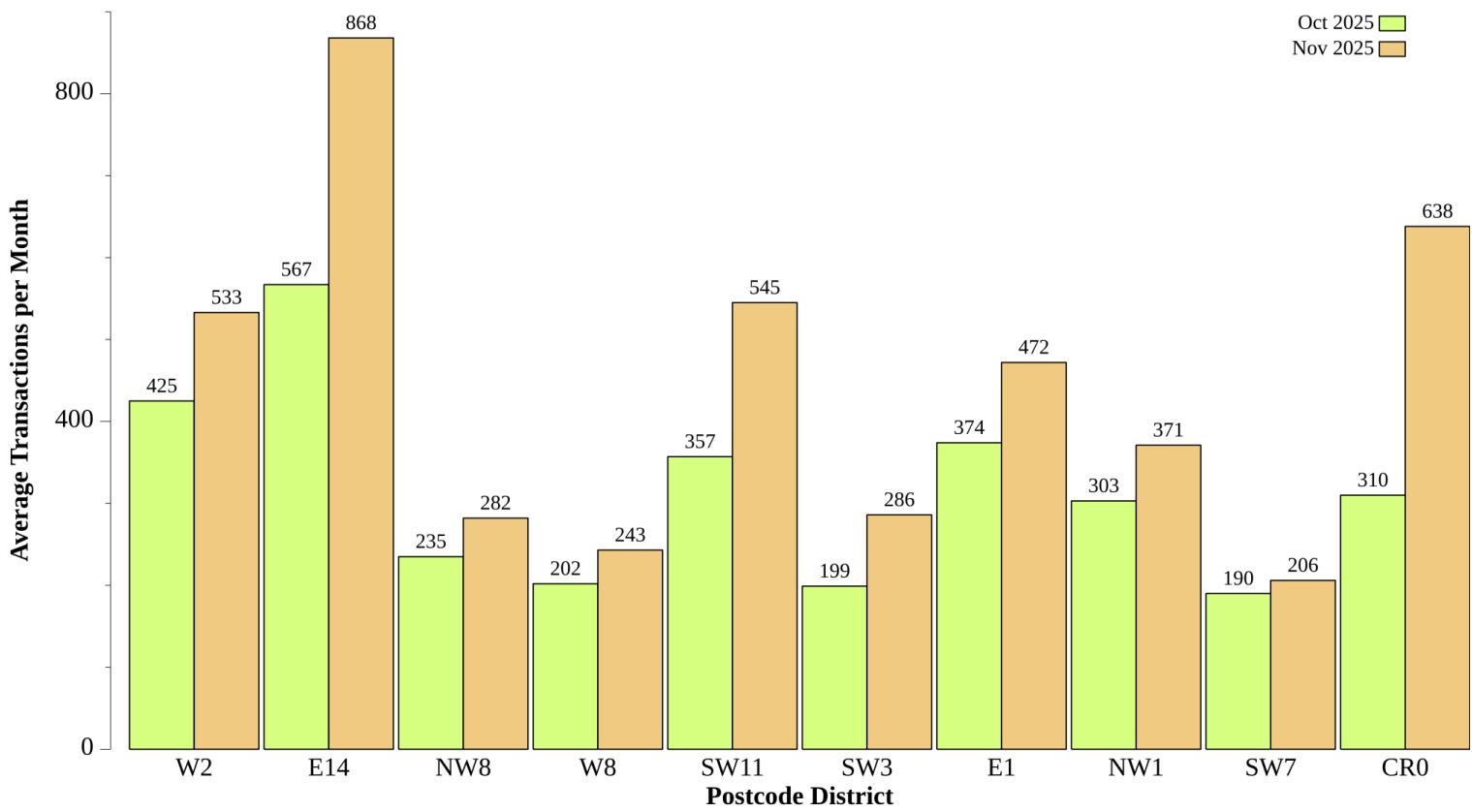
Comparison: Oct 2025 vs Nov 2025

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

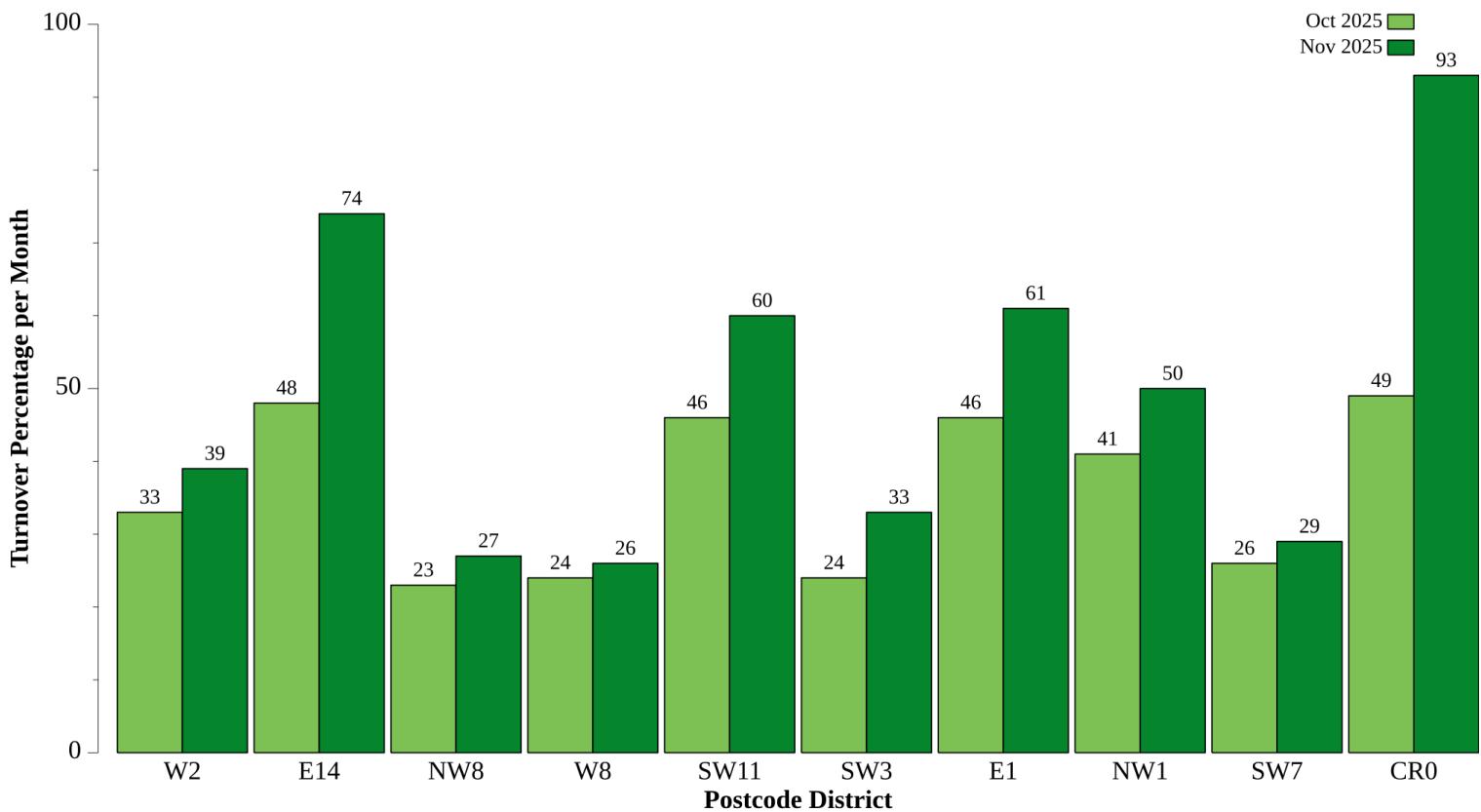


November shows a clear strengthening of landlord power: stock levels rose slightly while demand (transactions and turnover) accelerated much faster, pushing previously “Balanced” areas like NW8, W8, and SW3 firmly into “Landlord’s” territory. Markets with already strong demand (E14, SW11, E1, NW1, CR0) saw the sharpest jump in turnover, signalling renters competing harder for limited options. Even areas where supply dipped (like E1 and SW7) still saw demand rise, showing renters are absorbing stock faster than landlords can list it. Overall, the shift from October to November reflects a tightening rental market where demand is outpacing supply across price points, consolidating landlord advantage city wide.

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



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



Insights - November 2025

Market Trends and Dynamics

The market shows a quiet but powerful shift where renters are being pulled toward areas that offer “value density”, places like E14, E1, SW11, and CR0 where rents are more grounded yet demand is explosive. High end districts (W8, SW7, NW8) still attract interest, but their long days on market signal a ceiling: renters are no longer willing to pay any price just for prestige. Meanwhile, mid market zones with strong connectivity and lifestyle appeal are acting like magnets, converting listings into tenancies faster than supply can refresh. Overall, the trend is a split market: luxury areas are moving slowly, but practical, liveable districts are behaving like fast-moving commodities.

Market Fluctuations and Variability

The data reveals two layers of volatility: one driven by price range, and another by renter behaviour. Lower-priced districts (CR0, E1, E14) show extremely high turnover and short days on market, meaning demand is elastic, small increases in supply or pricing could swing the market quickly. High priced districts, on the other hand, show “sticky” behaviour: properties linger longer, and shifts in demand happen gradually because the renter pool is smaller and more deliberate. The variability across areas is not random, it reflects renters sorting themselves based on necessity vs. aspiration, creating sharp contrasts between markets that are only a few miles apart.

Market Possibilities and Opportunities

The real opportunities lie in districts where demand strength isn't fully priced in yet. CR0, E14, E1, and SW11 show a combination of fast turnover, reasonable rents, and strong renter absorption, signals that these areas are undervalued relative to their demand momentum. These markets could see price growth and faster yield cycles. Meanwhile, high rent areas with long days on market (W8, SW7, NW8) present an opportunity of a different kind: landlords who adjust pricing or reposition their listings (amenities, short-lets, corporate lets) can unlock value because supply is steady but renter expectations have evolved. In short, the market is full of openings, but they depend on understanding why renters move, not just where.