



scansan

Analytical Report

Sale Market Analysis (August, 2025)

Greater London

Intelligence Team

Overview

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

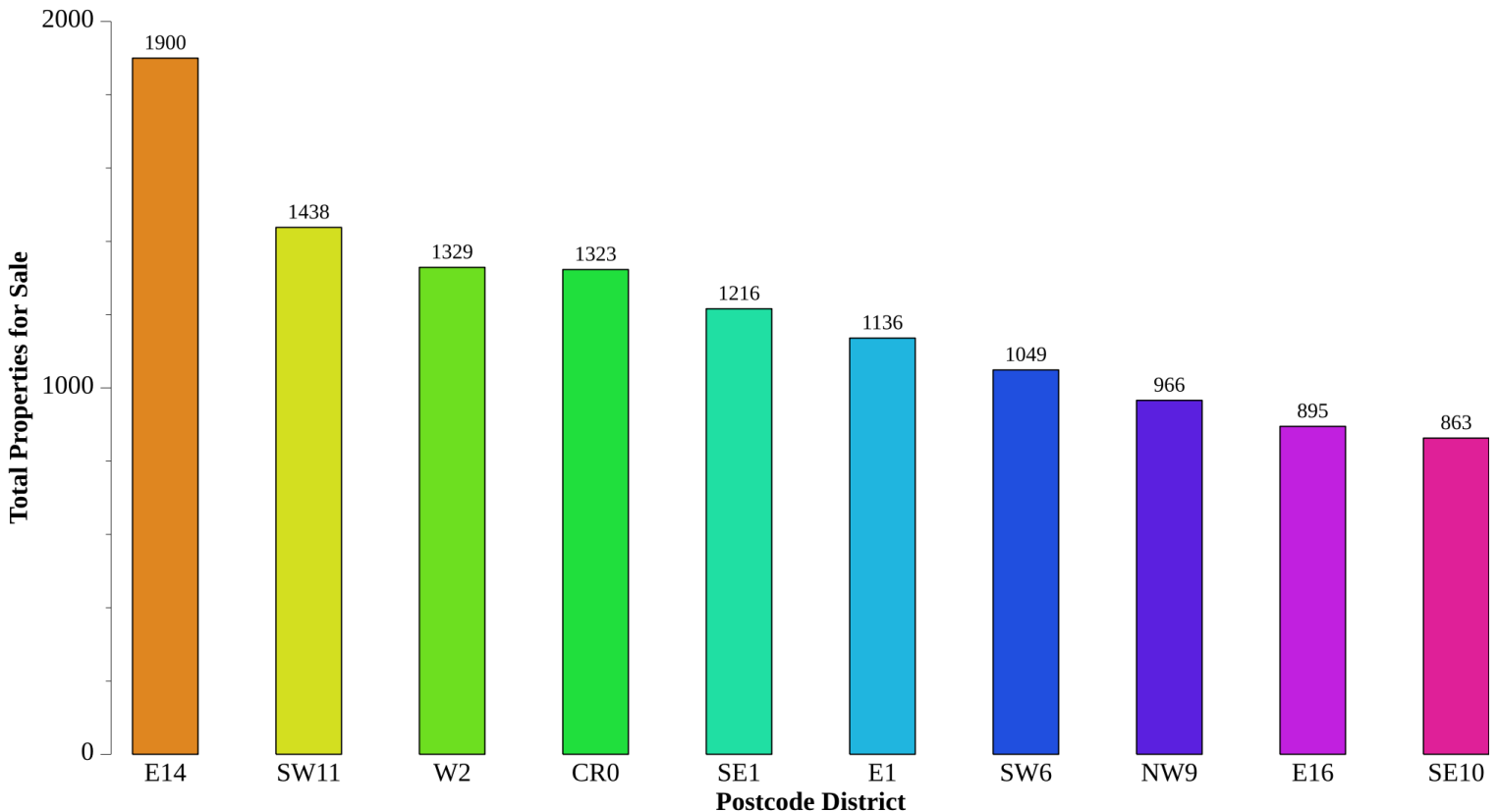
Key Metrics

- 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

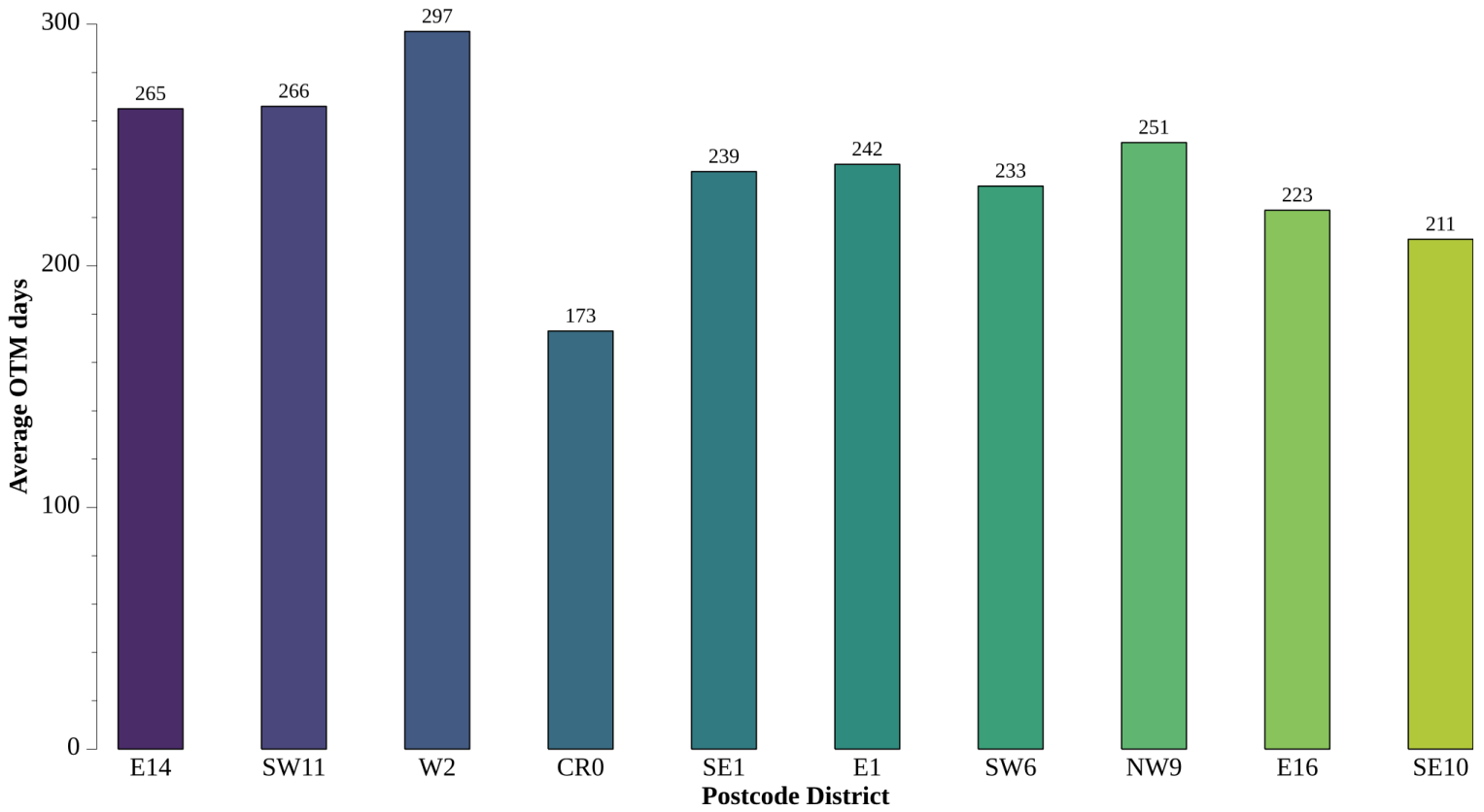
The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for August 2025.

Total Properties for Sale in Top 10 Districts - August 2025

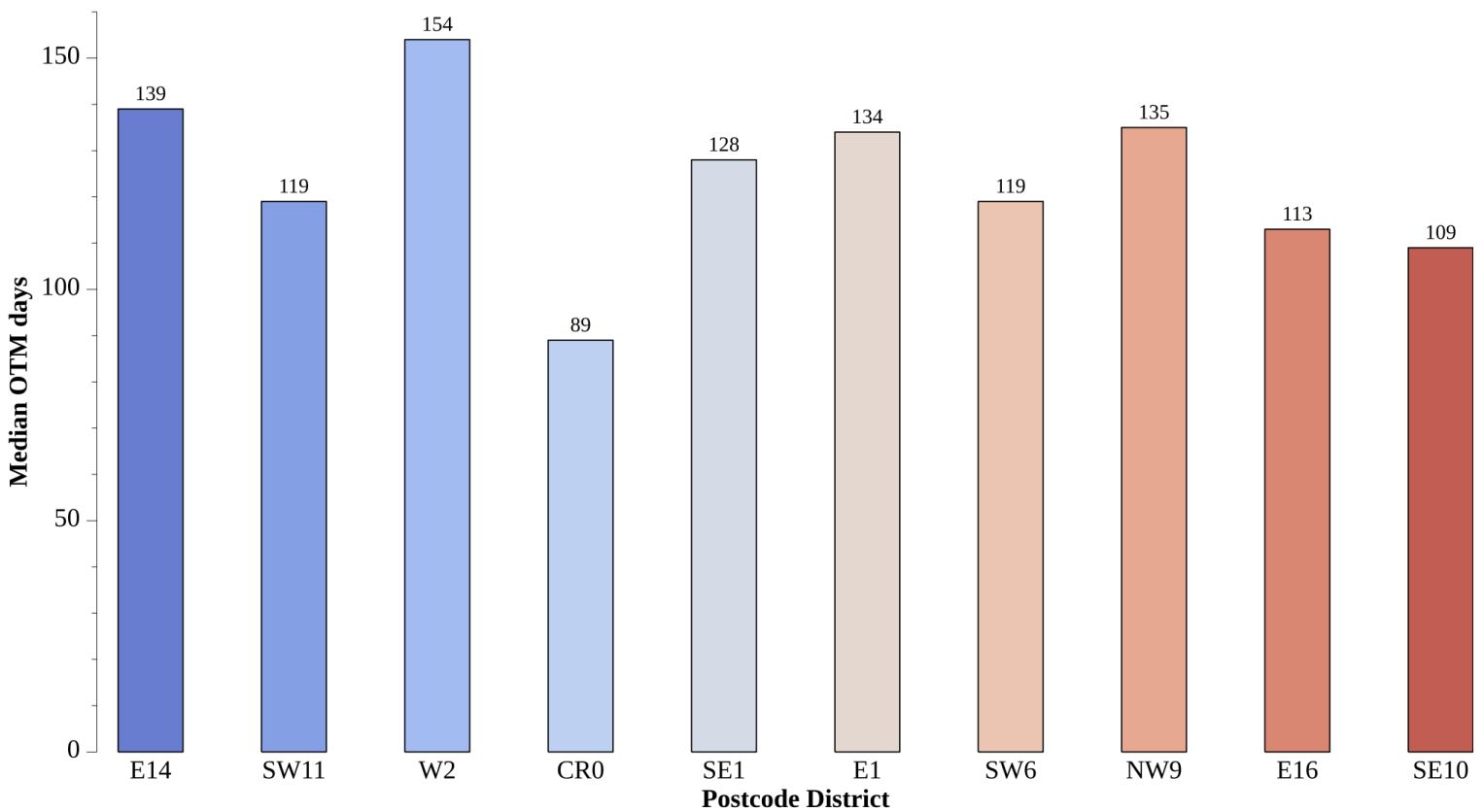


The market hints at subtle imbalances: high volume areas like E14, SW11, W2, and SE1 favor buyers, yet inflated mean prices show premium listings skewing perceptions. Balanced districts like CR0 and SE10 reveal more realistic pricing where supply meets demand. Smaller markets like E16 and NW9, though buyer friendly, suggest opportunities for sellers to stand out, as moderate supply and grounded pricing can attract ready buyers. Overall, supply and price gaps quietly shape market dynamics.

Average OTM days in Top 10 Districts - August 2025



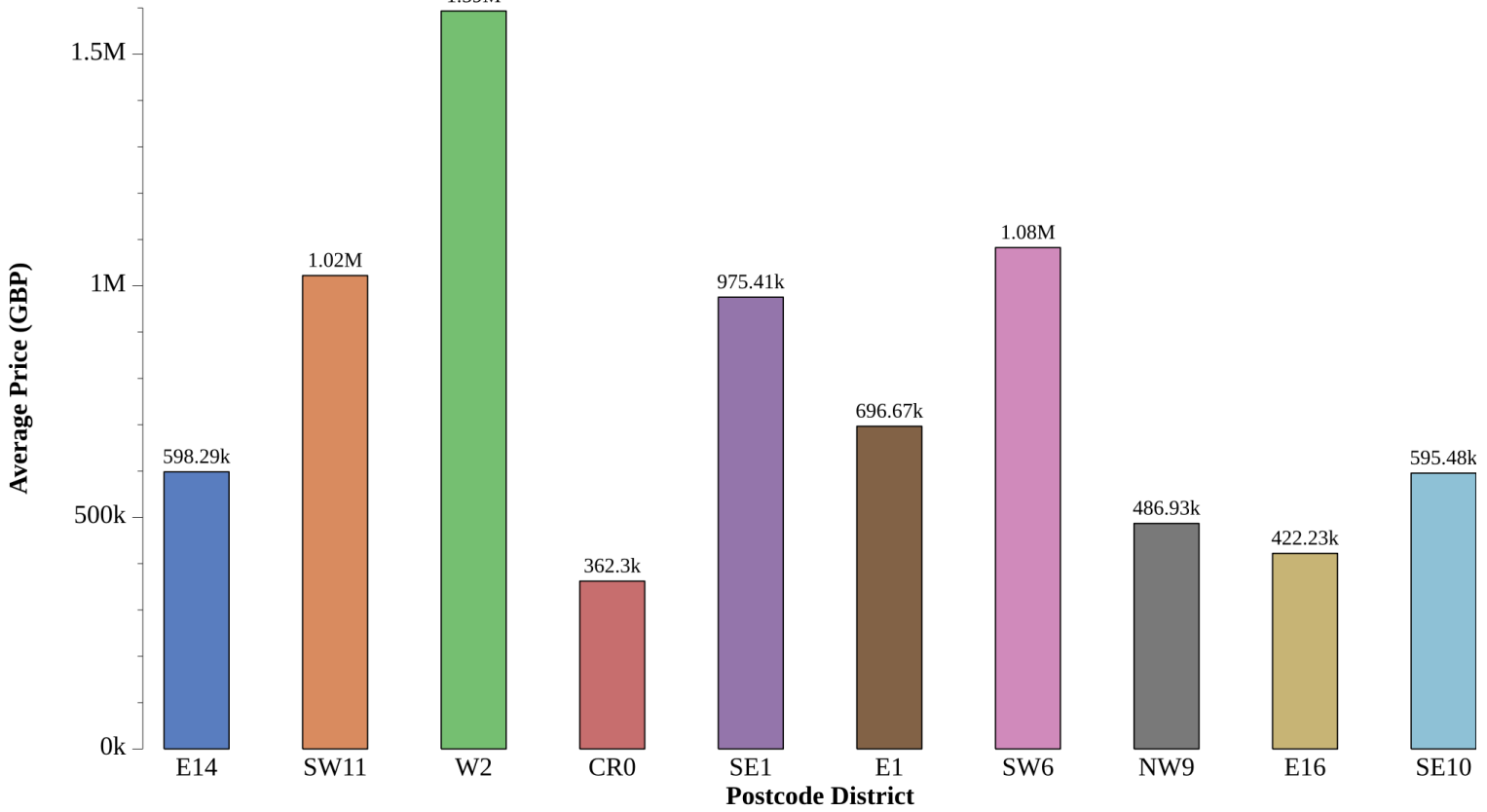
Median OTM days in Top 10 Districts - August 2025



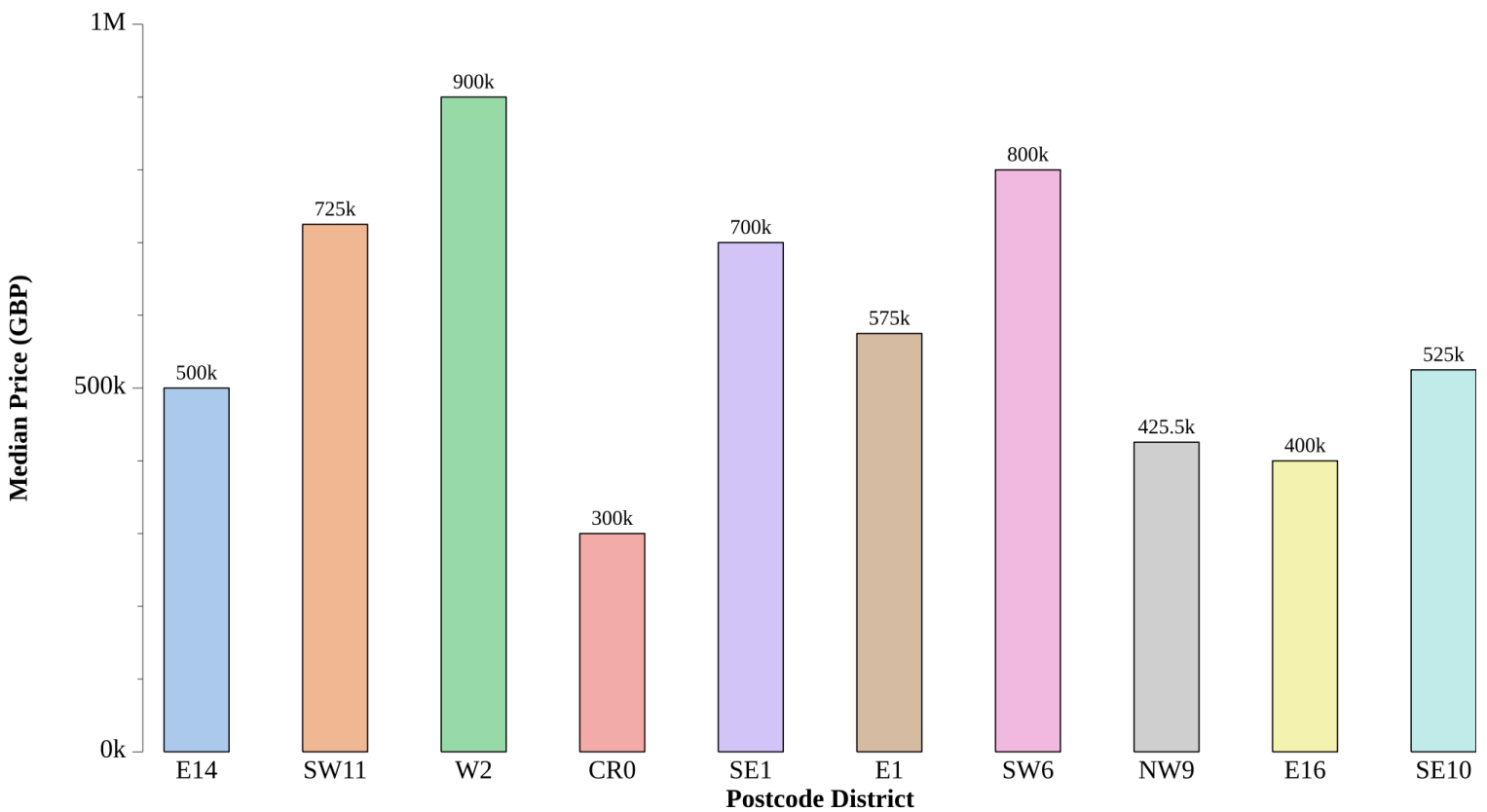
Looking beyond surface numbers, districts like E14, SW11, and W2 show long mean OTM days despite high supply, hinting at cautious buyers holding out for deals, while smaller markets like E16 and SE10 move faster, suggesting concentrated demand and quicker decision-making. Balanced markets such as CR0 and SE10 combine moderate inventory with lower OTM, reflecting a healthier alignment between price and buyer interest. Overall, OTM trends reveal hidden frictions in high-value areas and latent opportunities for sellers in tighter, quicker-moving districts.

Looking at pricing, high value districts like W2, SW6, and SW11 carry a wide gap between mean and median prices, suggesting a mix of ultra-premium and mid tier properties that stretch the averages, while more affordable areas like CR0, E16, and E14 have mean and median prices closer together, indicating more uniform pricing. This reveals that in expensive markets, selective property positioning or small luxury segments can significantly sway the average, whereas mid-market areas are more predictable and stable, giving clearer signals for buyers and investors.

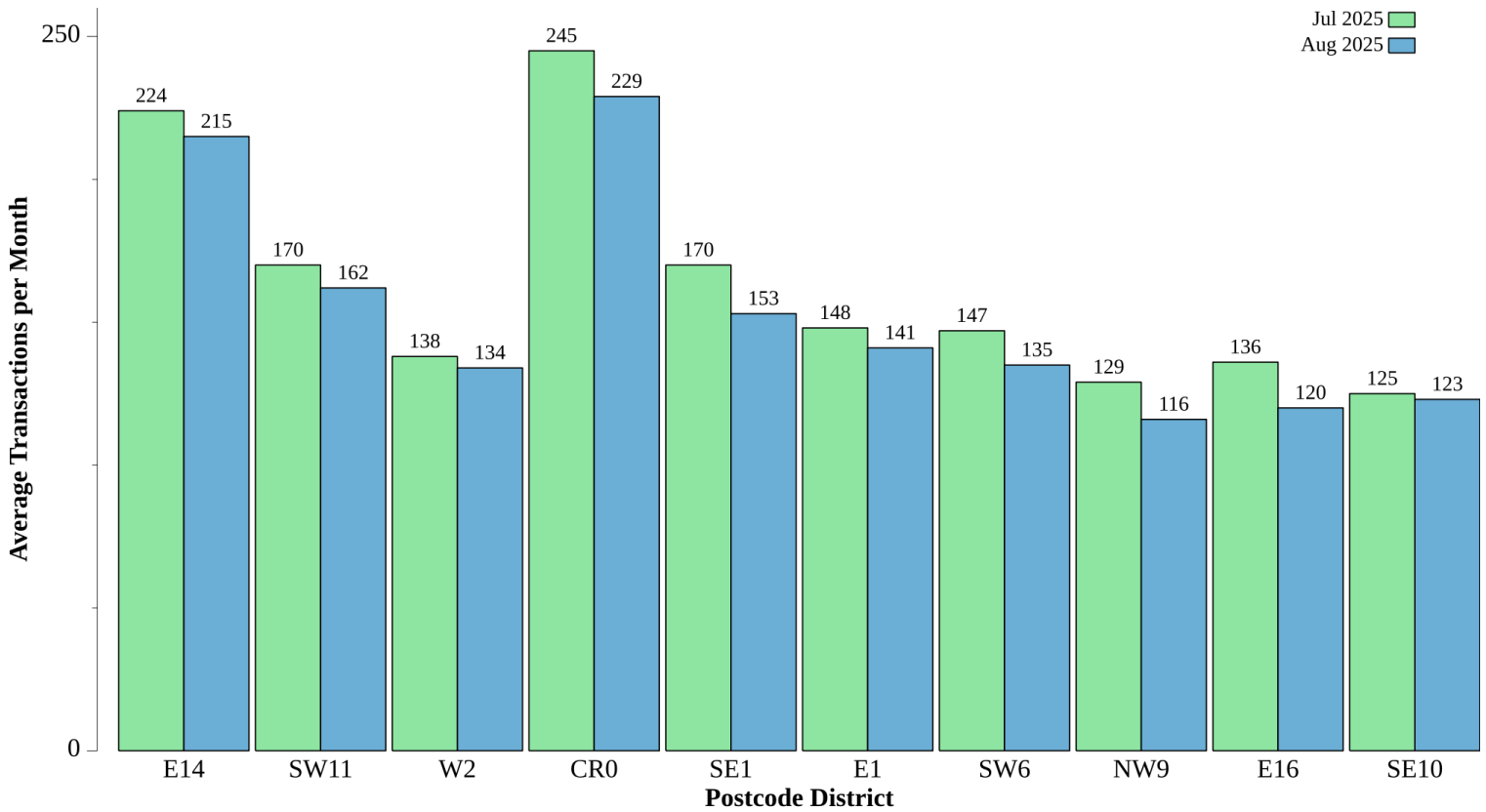
Average Price in Top 10 Districts - August 2025



Median Price in Top 10 Districts - August 2025



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



Looking at average transactions, larger markets like E14 and CR0 maintain relatively high activity despite a slight drop in numbers, indicating steady demand even with many properties available. In contrast, high value districts like W2, SW6, and SW11 show modest transactions relative to their listings, hinting at slower absorption and more selective buyer behavior. Overall, while turnover remains stable across months, the variation in transaction activity reveals which areas are actively moving versus those where listings linger, suggesting nuanced demand patterns that aren't obvious from property counts alone.

Insights - August 2025

Market Trends and Dynamics

The market is clearly skewed toward buyers across most areas, with high mean prices in premium districts like W2, SW6, and SW11 contrasting with more affordable zones like CR0 and E16. The large inventory and long average OTM days in high-value areas indicate cautious buyer behavior and slower absorption, while lower-priced districts see faster movement, suggesting demand is more elastic and sensitive to price.

Market Fluctuations and Variability

Variability is pronounced when comparing mean vs. median prices, revealing that expensive areas have more outliers, likely luxury or atypical listings, inflating averages. Turnover percentages remain low across the board, highlighting a structural sluggishness, yet districts like CR0 and SE10 show quicker transaction cycles relative to their inventory, hinting at localized efficiency in the market.

Market Possibilities and Opportunities

Opportunities lie in understanding where high inventory and long OTM coincide, W2 and SW11, for instance, could attract buyers with patience or targeted incentives. Meanwhile, mid-priced districts with shorter OTM and steady transactions, like CR0 and SE10, may offer quick wins for investors seeking faster liquidity. There's also potential for price

optimization: adjusting listings in overstocked, slow-moving premium zones could stimulate movement without broad market disruption.