



Analytical Report

Rent Market Analysis (September, 2025)

Greater London

Intelligence Team

Overview

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

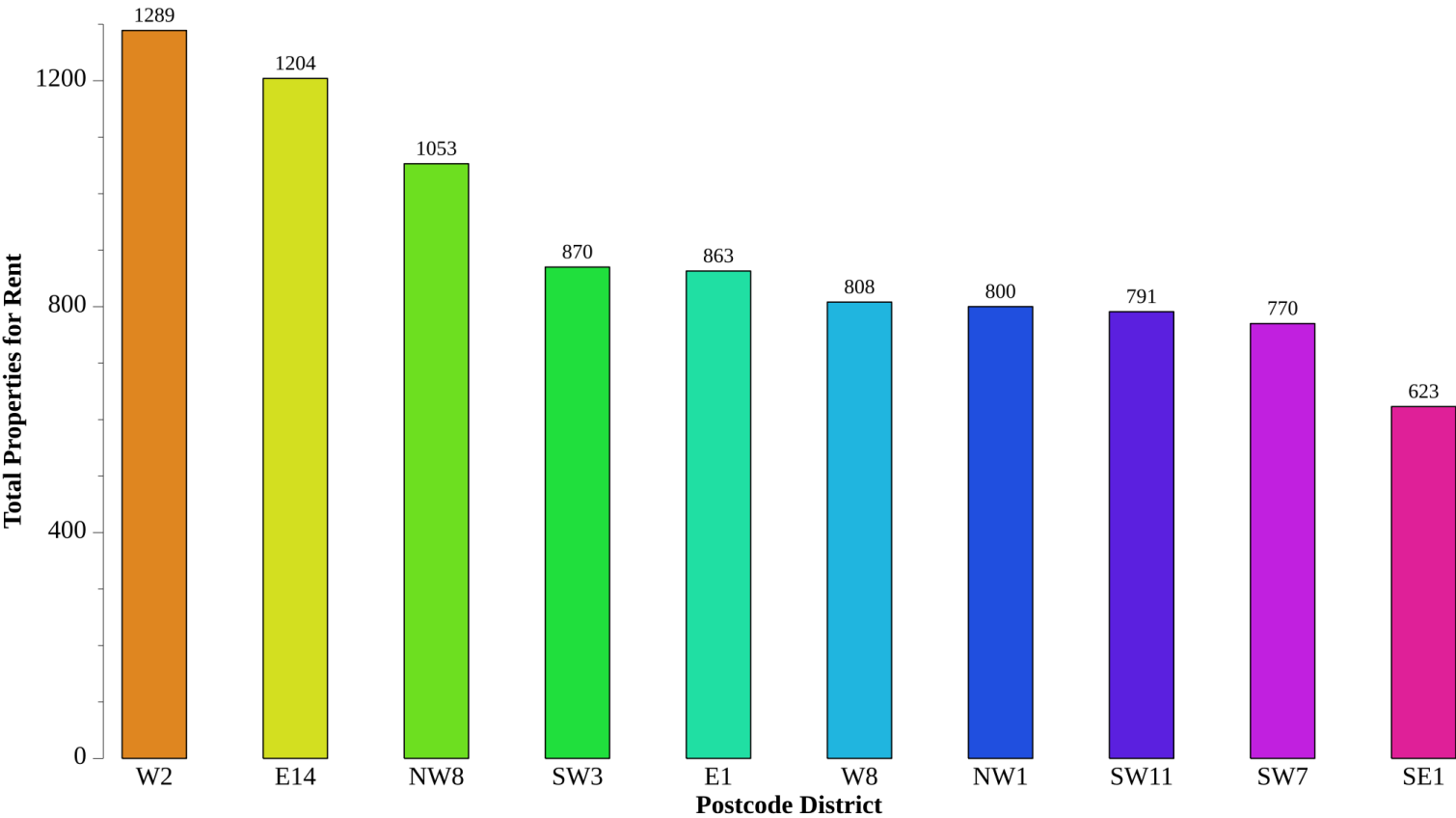
Key Metrics

- 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

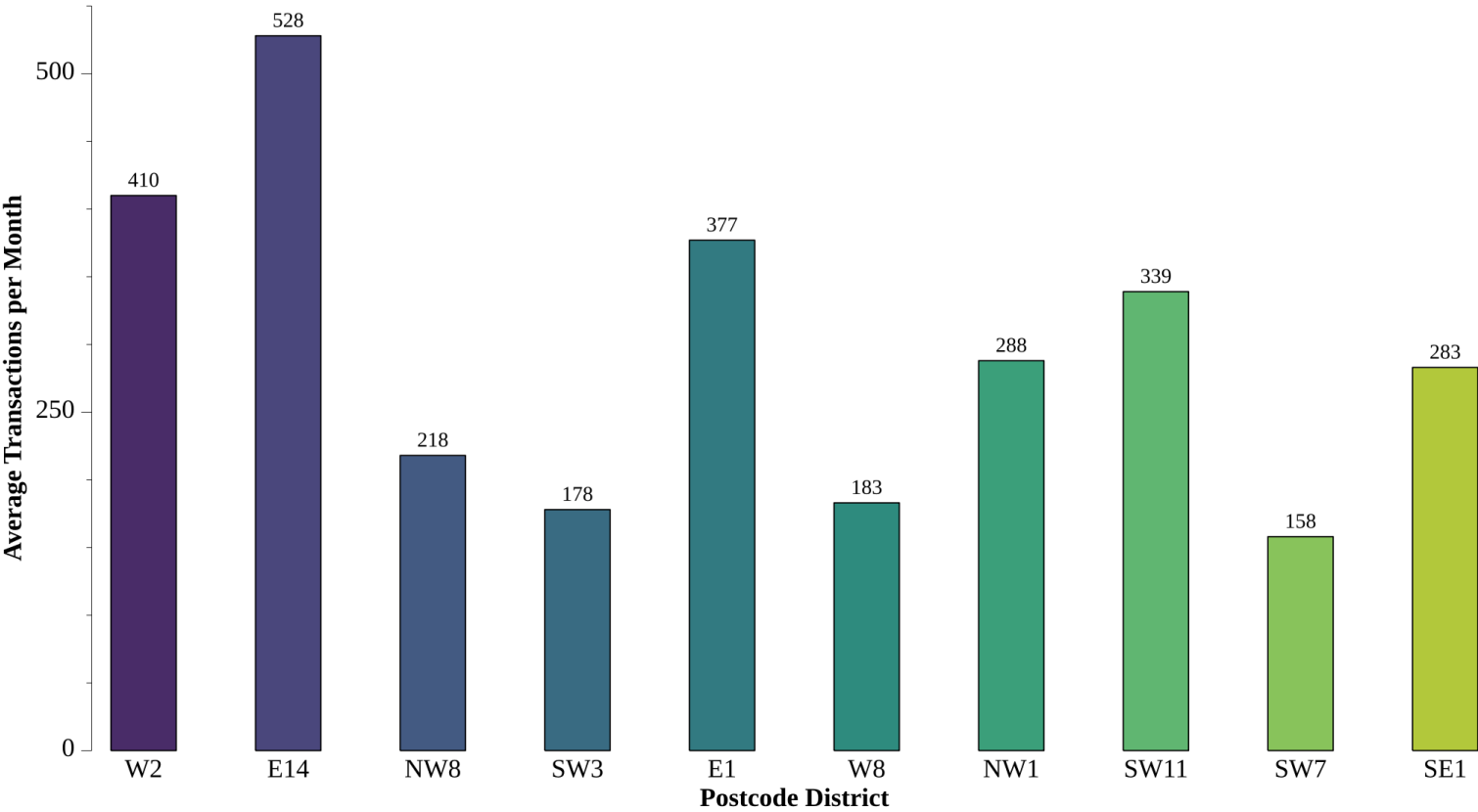
The following analysis provides an overview of the rental market in several postcode districts for September 2025.

Total Properties for Rent in Top 10 Districts - September 2025



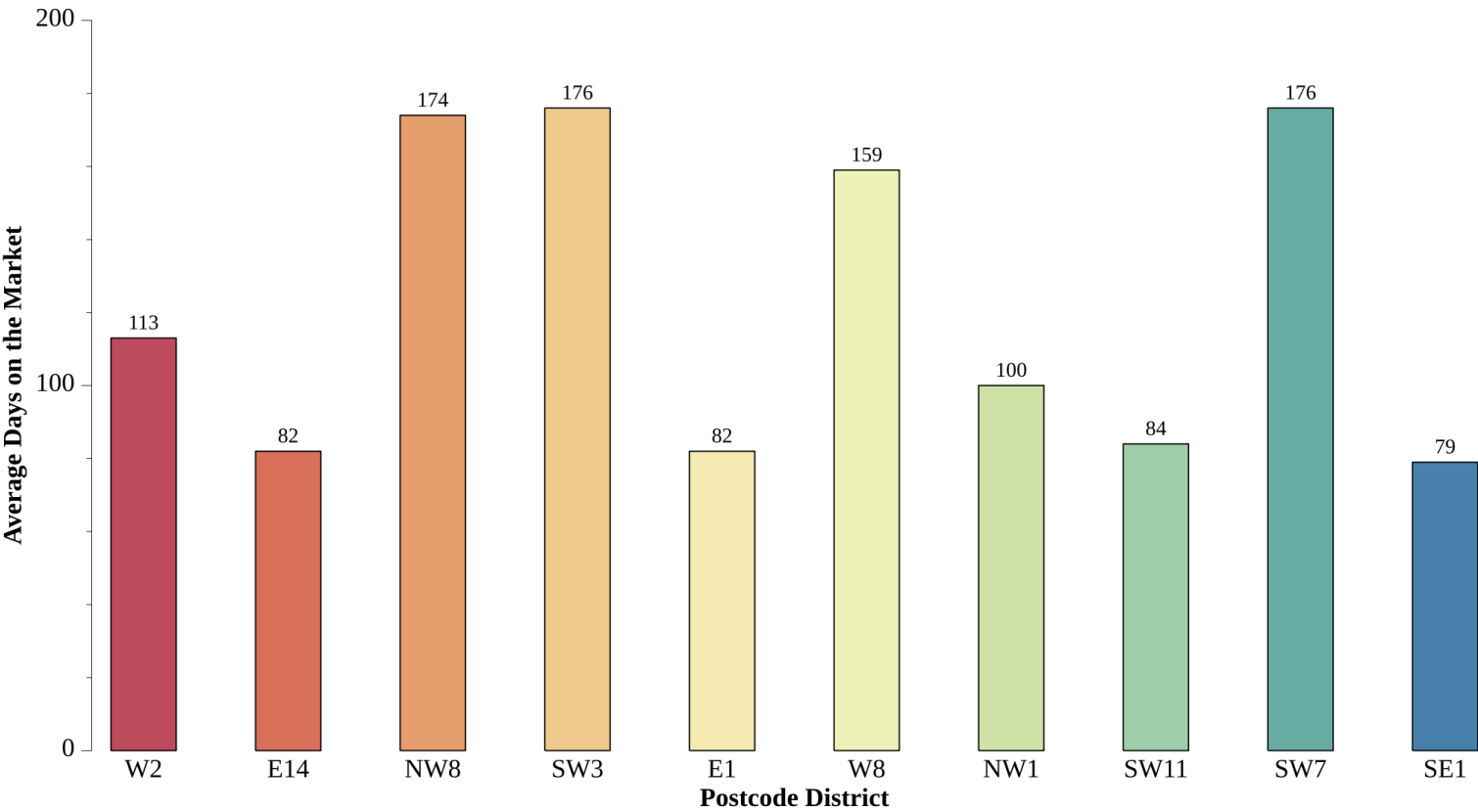
The rental market is split: mid market hubs like E14, E1, and SW11 favour landlords, with strong demand keeping rents firm and stock moving, while prime areas such as NW8, SW3, W8, and SW7 show more balance as high rents face tenant selectivity. Large gaps between mean and median in luxury zones signal aspirational pricing dragging up averages but not always driving quick lets. In contrast, volume driven districts align rents with tenant budgets, giving landlords leverage, while prestige markets must compete harder.

Average Transactions per Month in Top 10 Districts - September 2025



Postcode District	Turnover (%) per Month
W2	32
E14	44
NW8	21
SW3	20
E1	44
W8	23
NW1	36
SW11	43
SW7	20
SE1	45

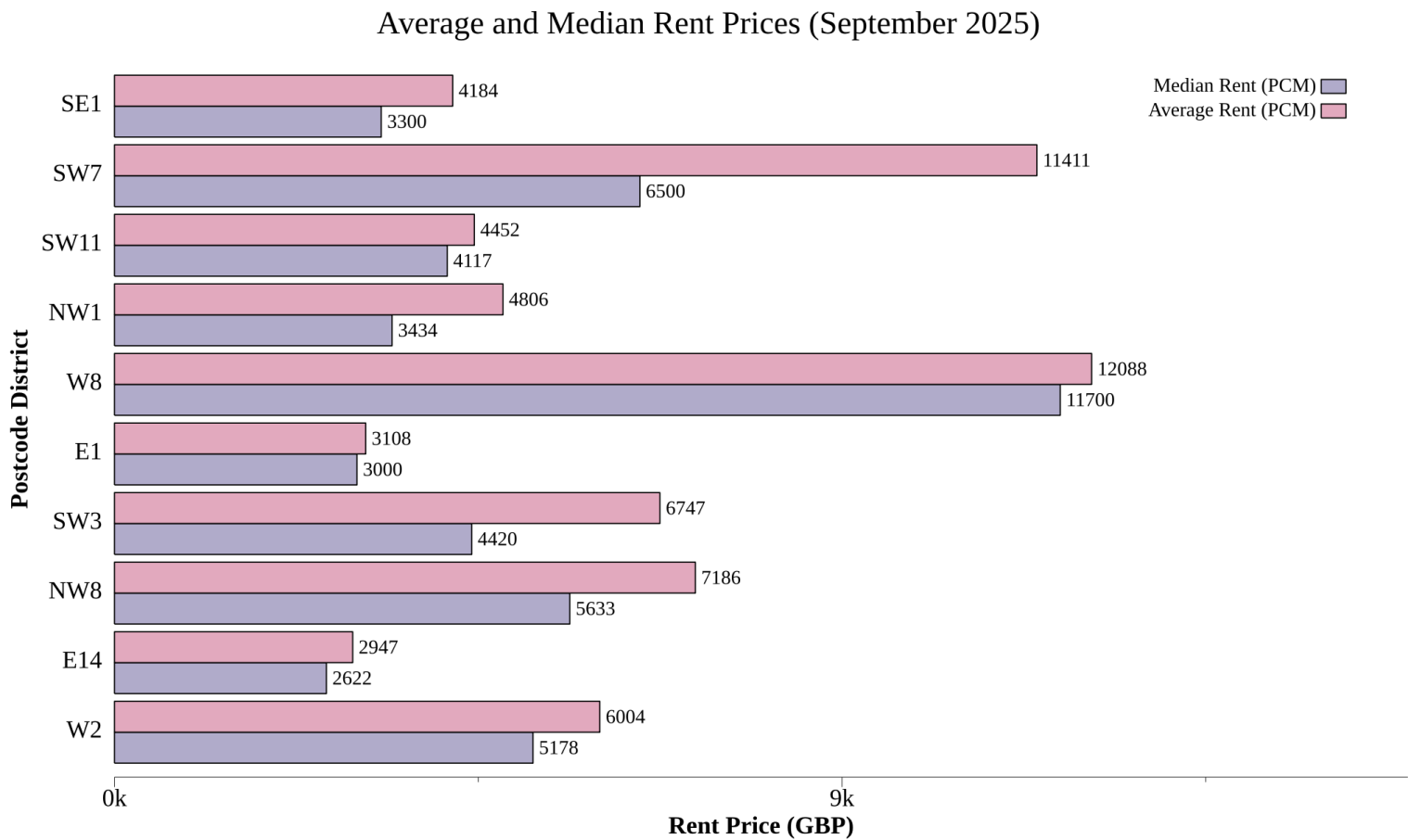
Average Days on the Market in Top 10 Districts - September 2025



Postcode District	Months of Inventory
W2	3.1
E14	2.3
NW8	4.8
SW3	4.9
E1	2.3
W8	4.4
NW1	2.8
SW11	2.3
SW7	4.9
SE1	2.2

Average & Median Prices Analysis

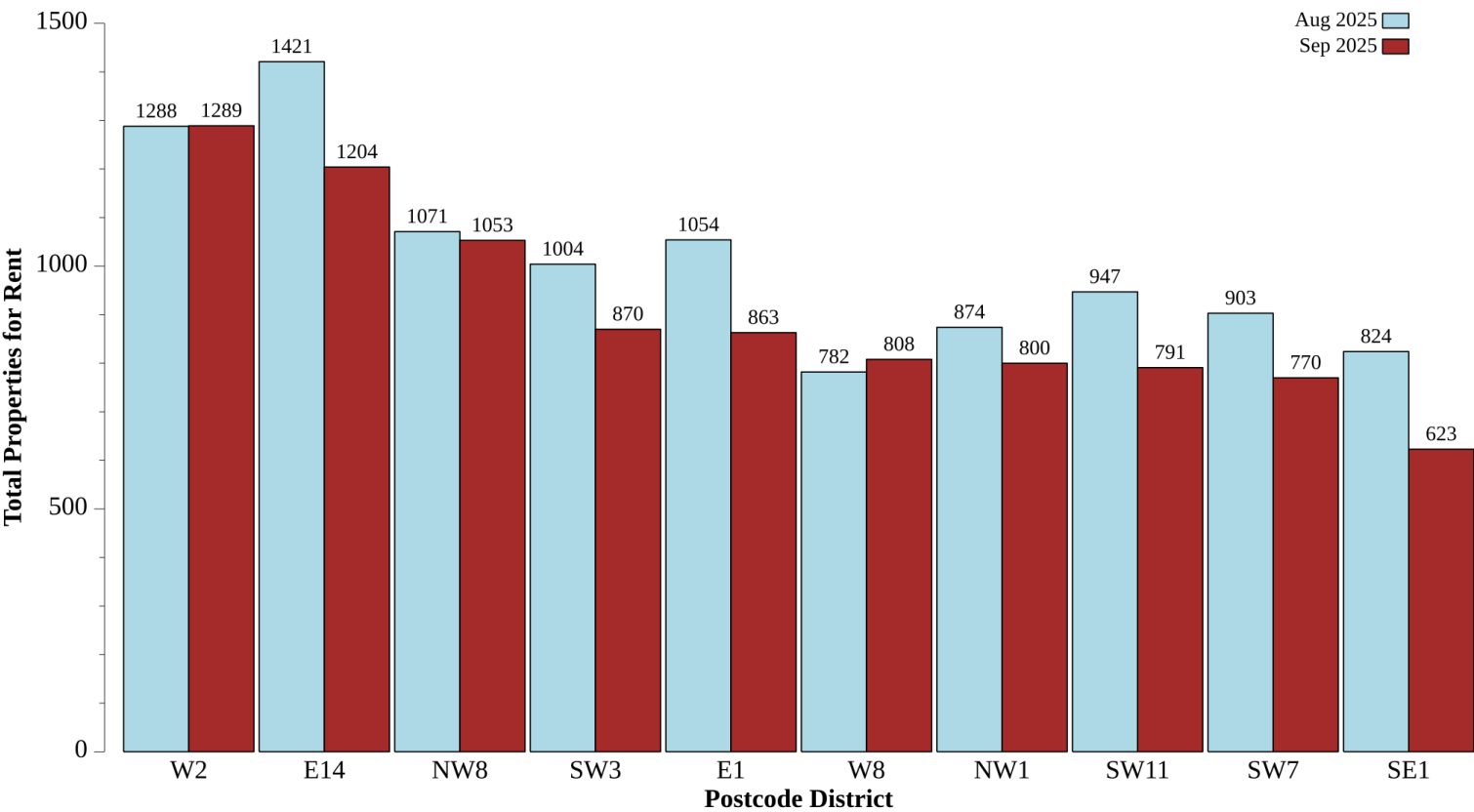
The following analysis provides an overview of the rental market in several postcode districts for September 2025.



Landlord driven areas like W2, E14, E1, SW11, NW1, and SE1 show tighter gaps between mean and median rents, meaning prices reflect what tenants actually pay and landlords hold stronger ground. In balanced markets like NW8, SW3, W8, and SW7, wider gaps suggest luxury rents skew the averages while median values reveal pushback, making these areas more negotiable and less predictable.

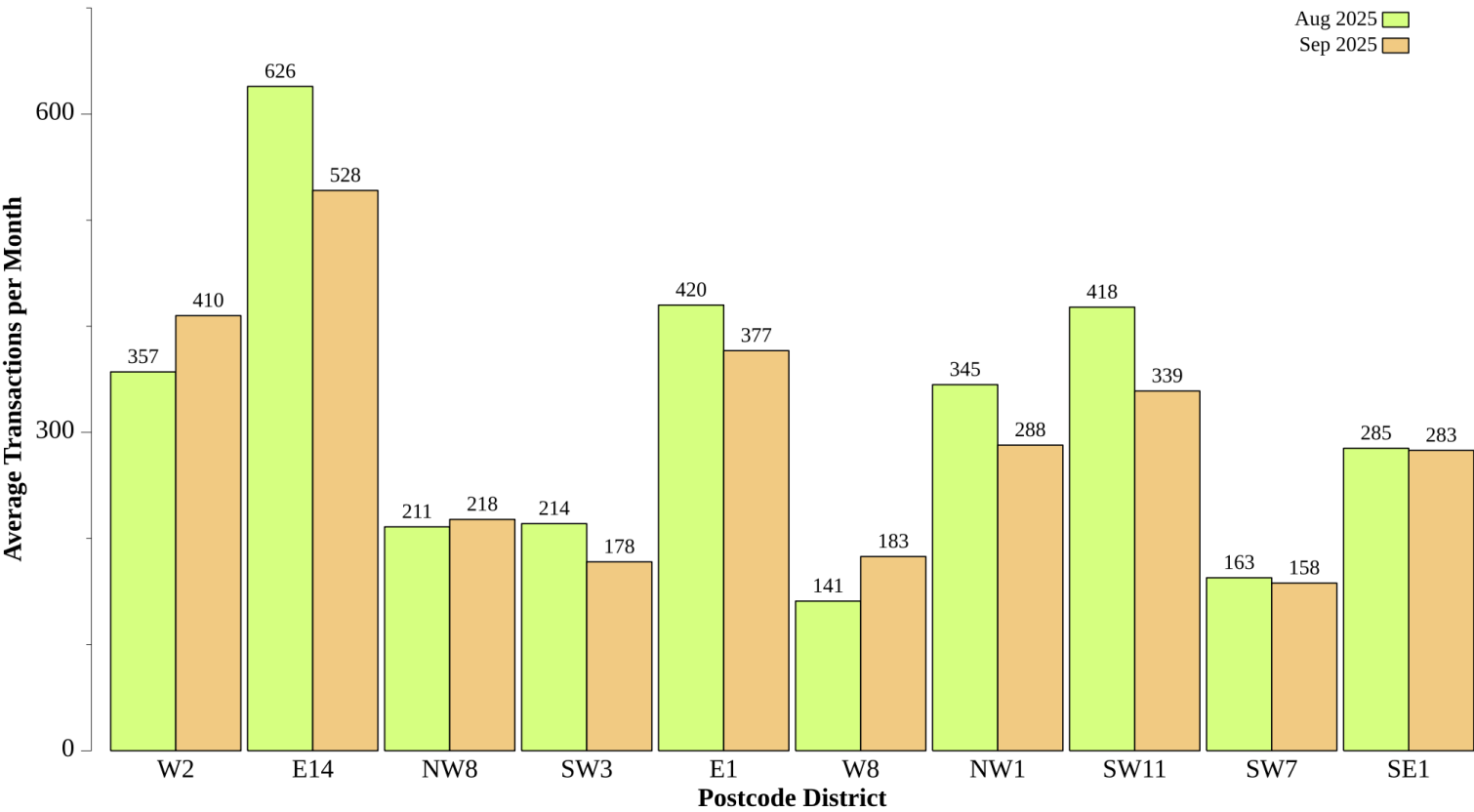
Comparison: Aug 2025 vs Sep 2025

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

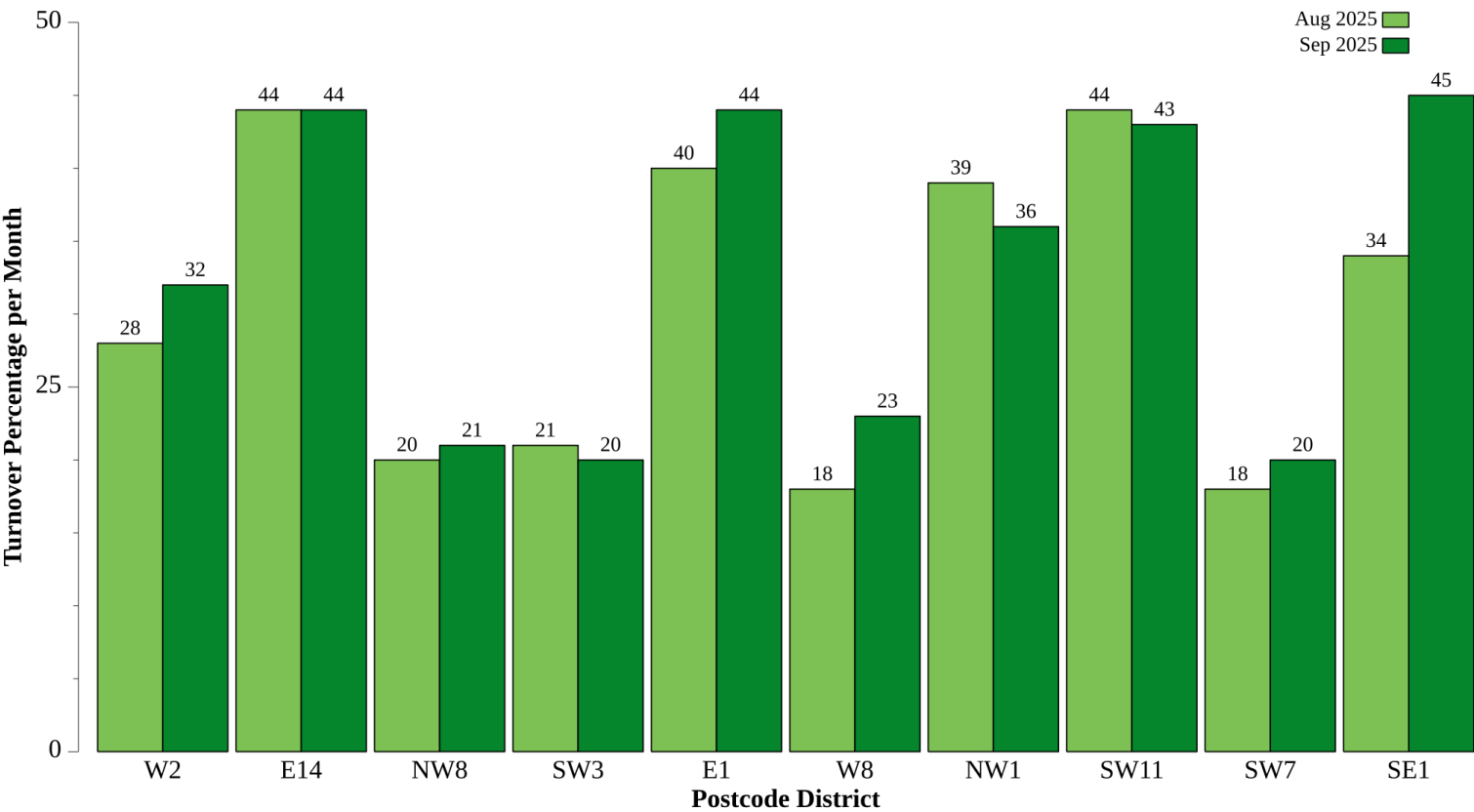


Between August and September, the rental market shows a quiet but telling shift in power. Prime landlord markets like W2 and SE1 tightened further, rents edged higher, days on market dropped, and turnover quickened, suggesting tenants had fewer chances to negotiate. In contrast, luxury heavy districts such as W8 and SW7 leaned toward greater balance: inventory thinned, but rising rents and slower absorption pointed to a more selective demand that filters out only the most desirable stock. Meanwhile, high churn zones like E14 and E1 stayed stable in their landlord dominance, though with slightly softer activity, showing that while supply corrected, tenant appetite still carried momentum.

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



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



Insights – September 2025

Market Trends and Dynamics

The rental market shows a clear segmentation: districts labeled as Landlord's like W2, E14, E1, NW1, SW11, and SE1 demonstrate steady absorption with moderate to high turnover and shorter days on market, indicating strong tenant demand and sustained landlord leverage. Balanced markets such as NW8, SW3, W8, and SW7, with higher rents and slower transaction cycles, signal selective tenant activity where pricing power exists but only for premium or well positioned properties.

Market Fluctuations and Variability

There's a striking contrast between mean and median rents, especially in luxury areas (e.g., W8, SW7), where outliers push averages higher, reflecting pockets of ultra high rent activity alongside more moderate rentals. Inventory and turnover also vary widely, showing that while mid market districts are relatively liquid, prime zones fluctuate with tenant preference and seasonal listing patterns, suggesting underlying volatility not visible from headline figures.

Market Possibilities and Opportunities

Landlord-favored zones with lower but stable rents (E14, SE1) offer opportunities for consistent yields and faster occupancy, while balanced, high rent districts present strategic potential for targeted, premium offerings where landlords can maximize income if they align

with niche tenant demand. Investors can exploit the gap between mean and median rents to identify undervalued sub segments, and shorter days on market in certain areas hint at emerging hotspots where early movers can capture advantage before broader market adjustment occurs.