



scansan

Analytical Report

Rent Market Analysis (January, 2026)

Greater London

Intelligence Team

Overview

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

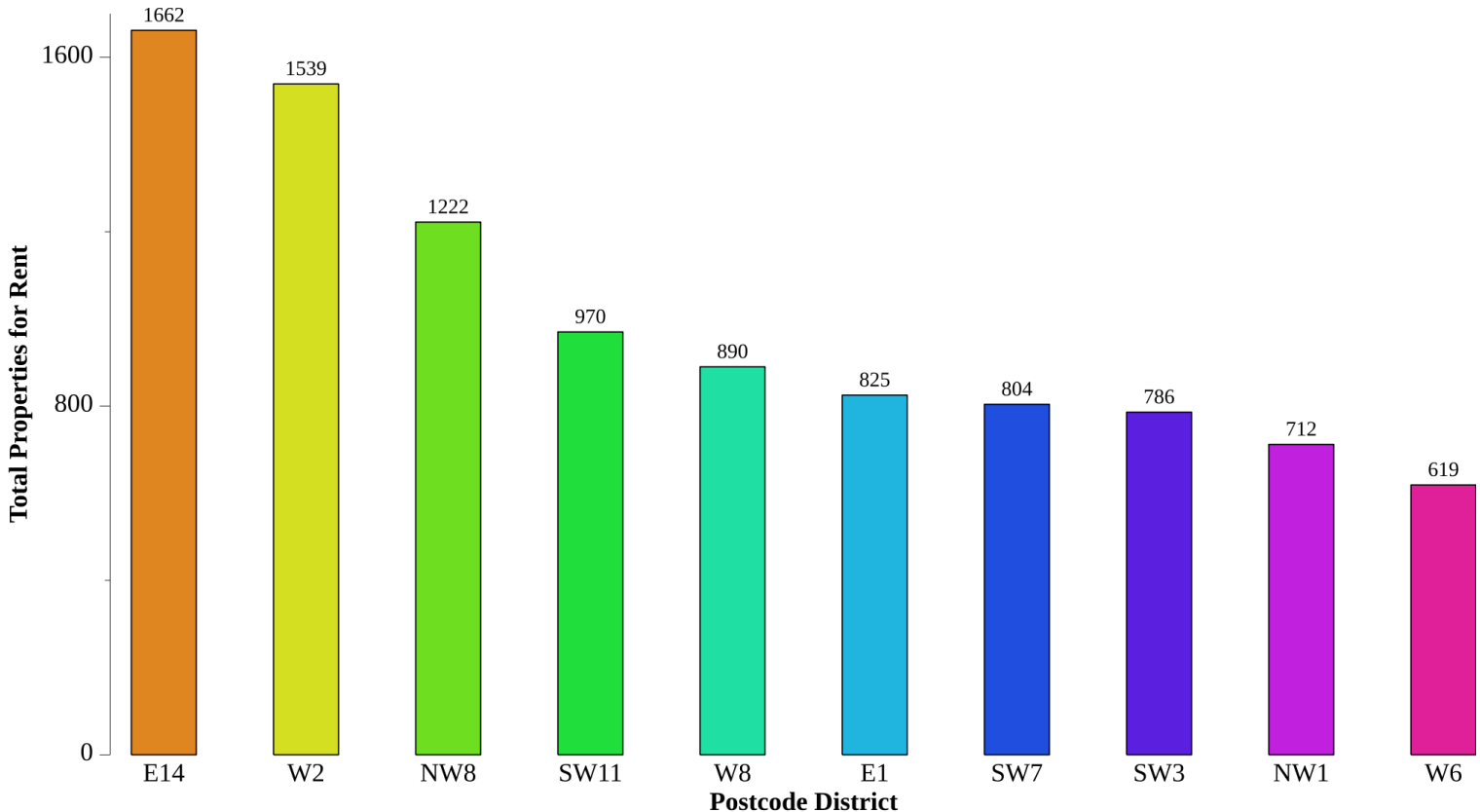
Key Metrics

- 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

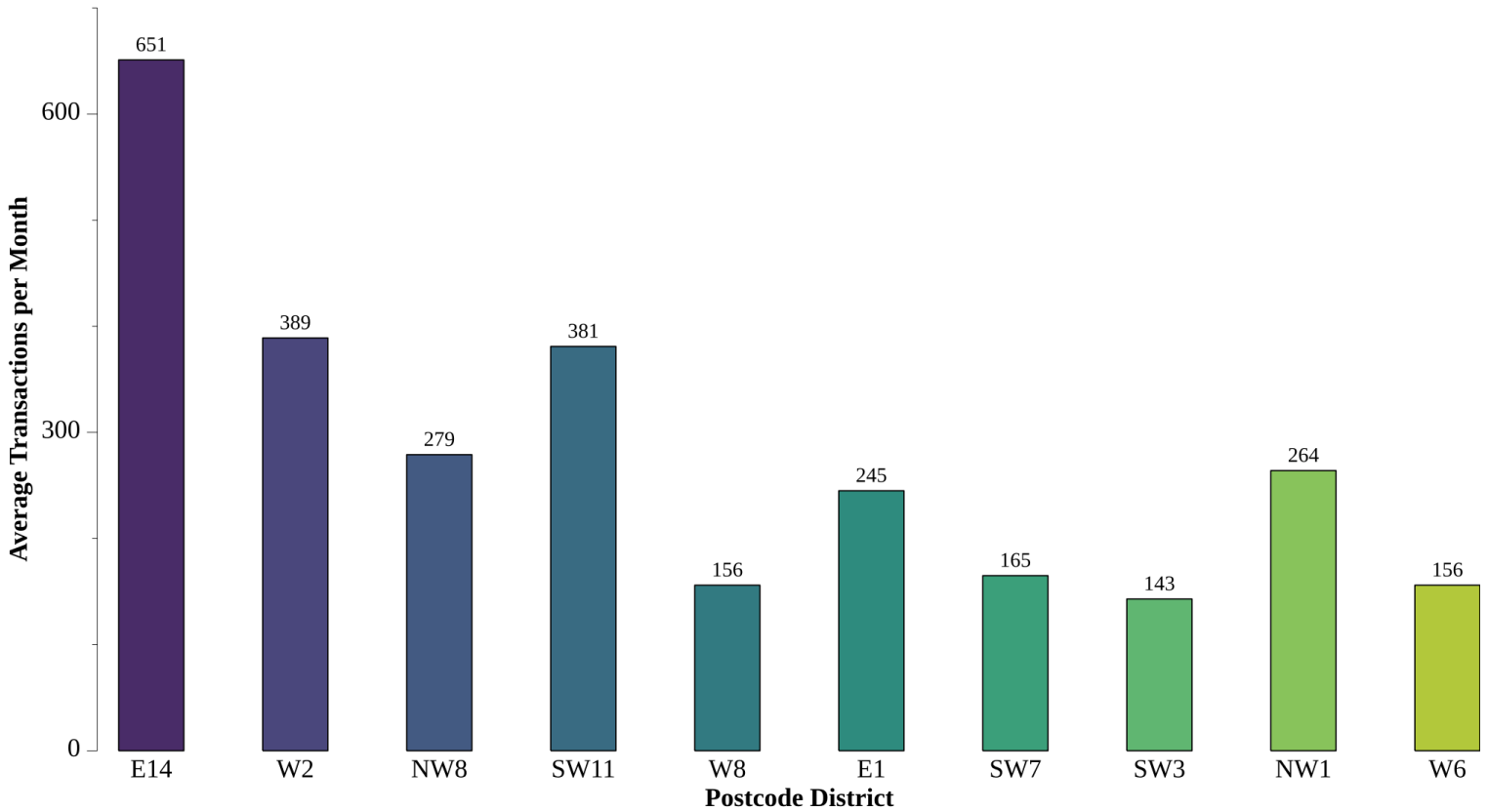
The following analysis provides an overview of the rental market in several postcode districts for January 2026.

Total Properties for Rent in Top 10 Districts - January 2026



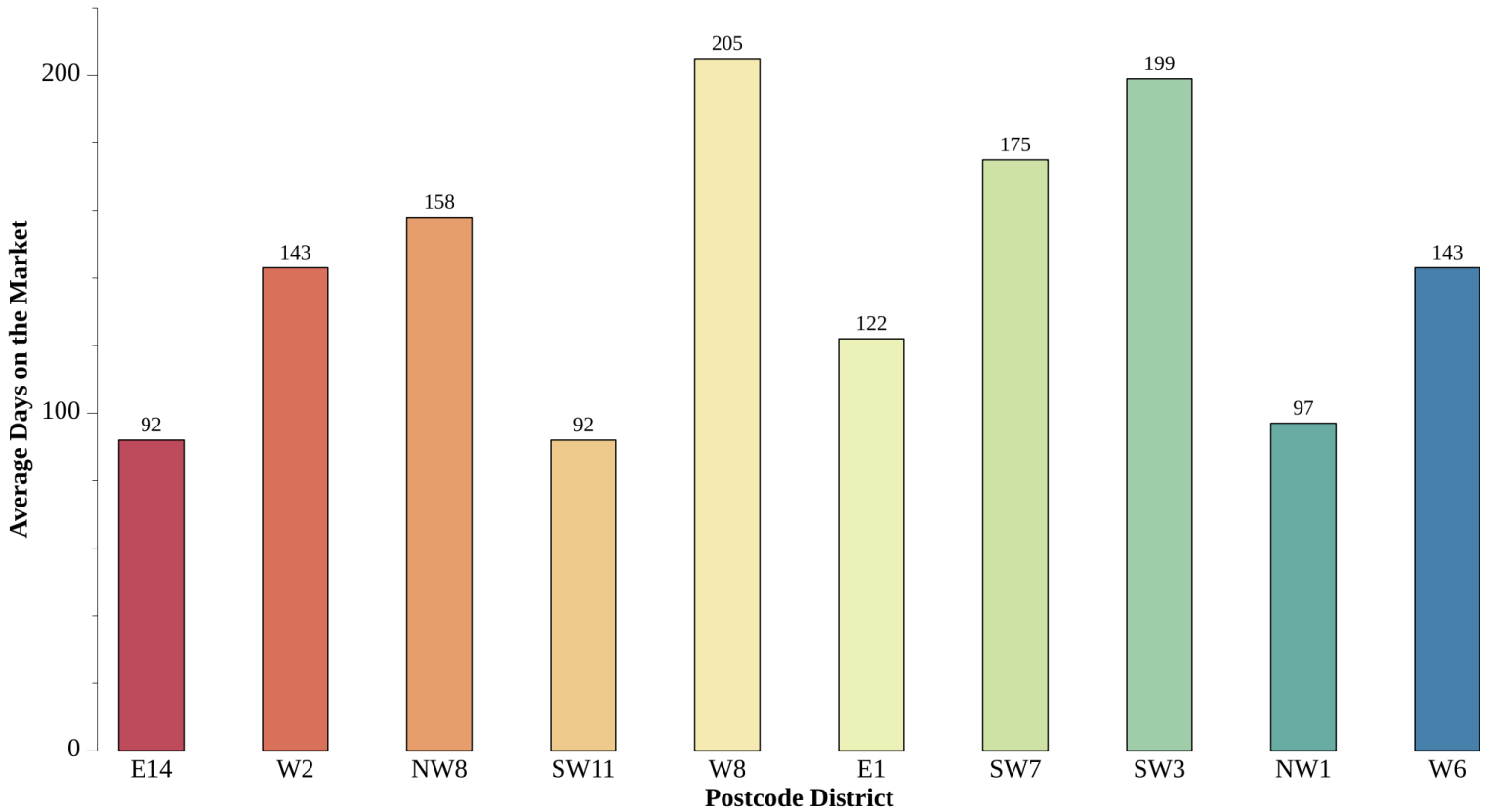
January 2026 highlights a clear divide in London's rental market between liquidity-driven landlord zones and slower, prestige-led central districts. Areas like E14, SW11 and NW1 sustain strong churn despite high supply, proving demand depth; not scarcity; drives performance. Prime areas such as W8, SW3 and SW7 move more slowly, where wider rent spreads and longer marketing times reflect negotiation and selective demand. Core, employment markets remain resilient, while prime areas adjust through time rather than price drop.

Average Transactions per Month in Top 10 Districts - January 2026



Postcode District	Turnover (%) per Month
E14	39
W2	25
NW8	23
SW11	39
W8	18
E1	30
SW7	21
SW3	18
NW1	37
W6	25

Average Days on the Market in Top 10 Districts - January 2026

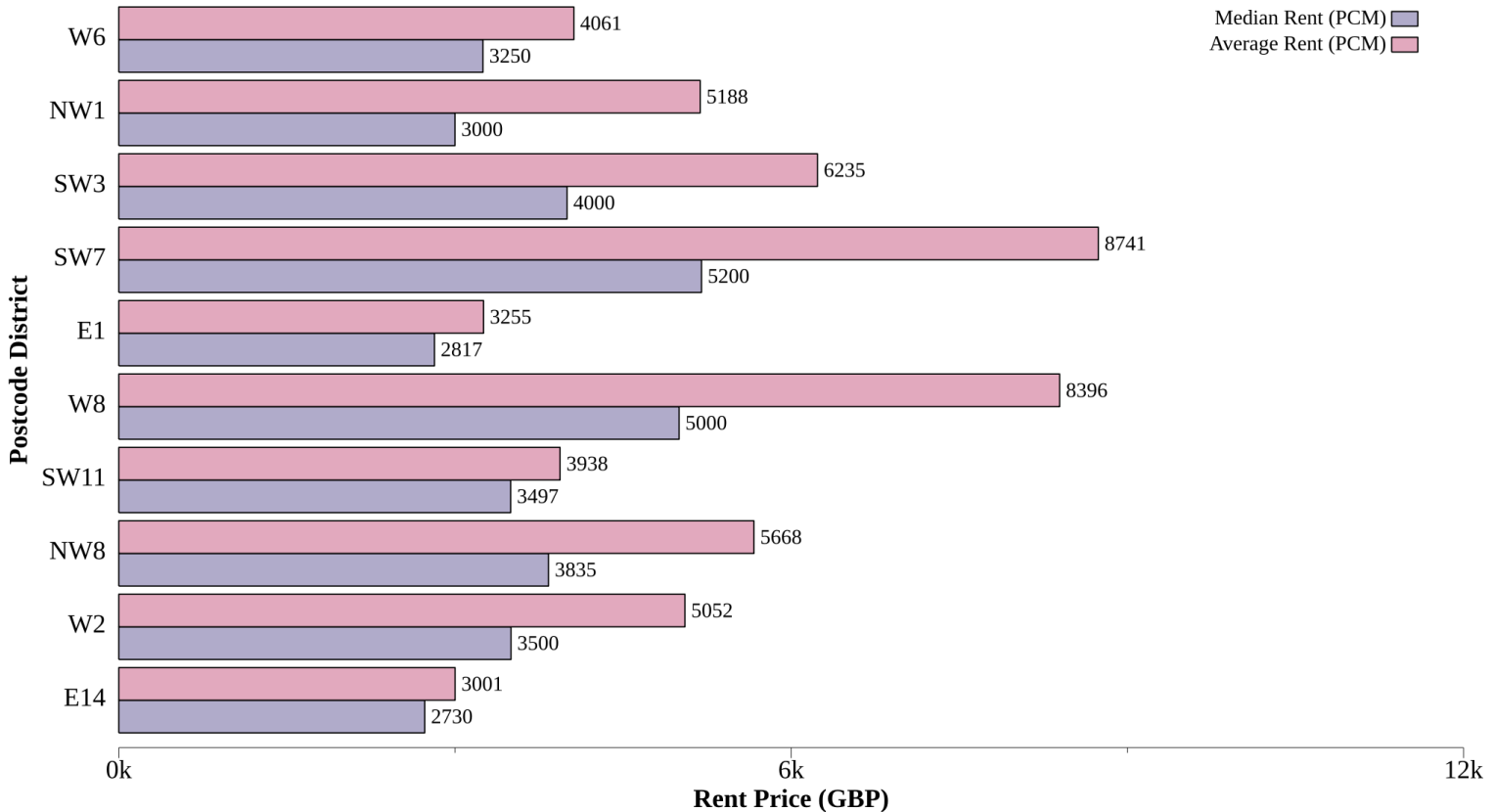


Postcode District	Months of Inventory
E14	2.6
W2	4
NW8	4.4
SW11	2.5
W8	5.7
E1	3.4
SW7	4.9
SW3	5.5
NW1	2.7
W6	4

Average & Median Prices Analysis

The following analysis provides an overview of the rental market in several postcode districts for January 2026.

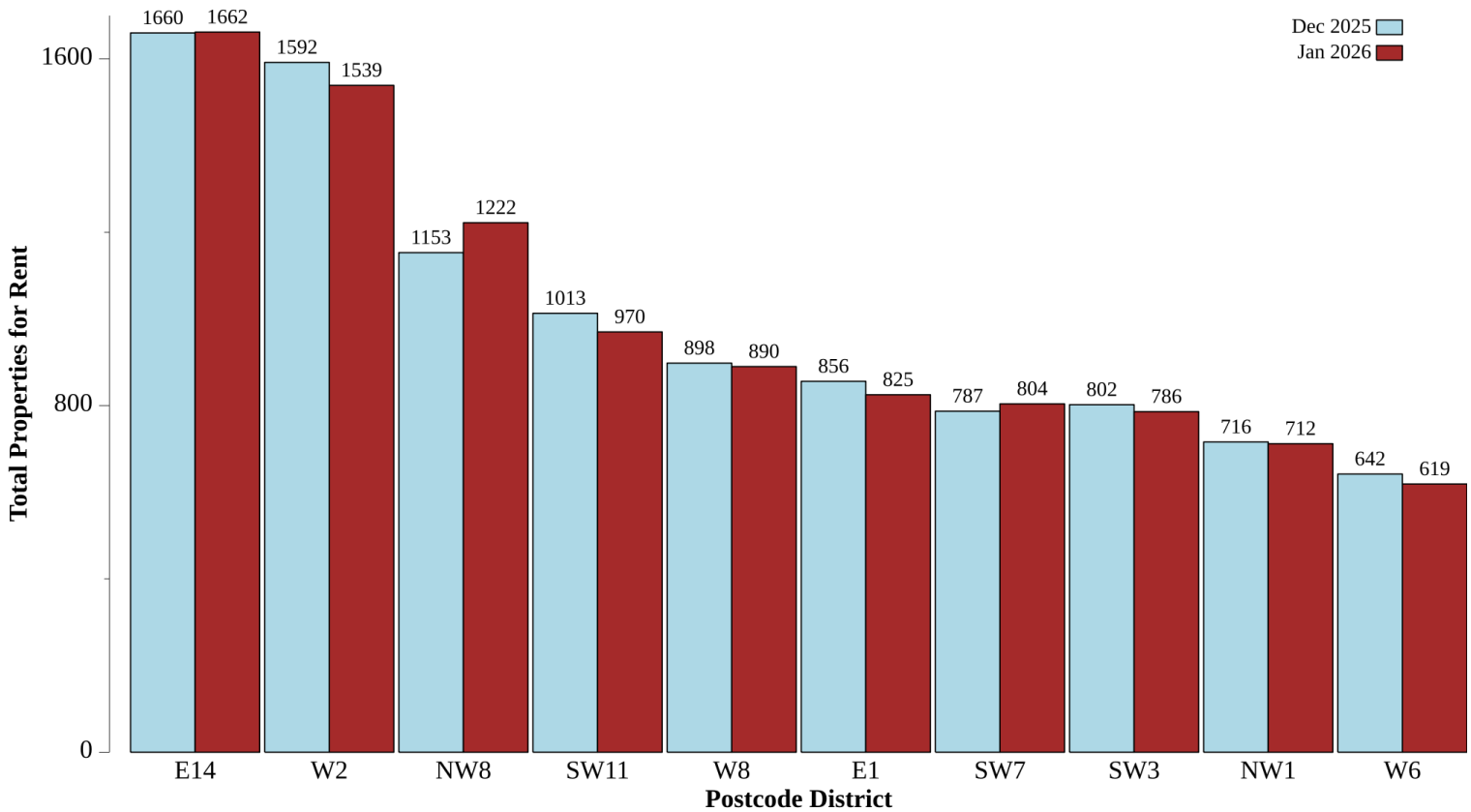
Average and Median Rent Prices (January 2026)



The relationship between mean & median rent gaps and market rating reveals where pricing power is genuine versus fragile. Districts such as E14, SW11, E1 and NW1 show relatively tighter rent spreads alongside Landlord's market ratings, indicating pricing is anchored close to where tenants actually transact, supporting faster absorption. In contrast, W8, SW3 and SW7 display much wider gaps and Balanced ratings, signalling that headline rents are skewed by premium listings while the typical deal clears lower and more slowly.

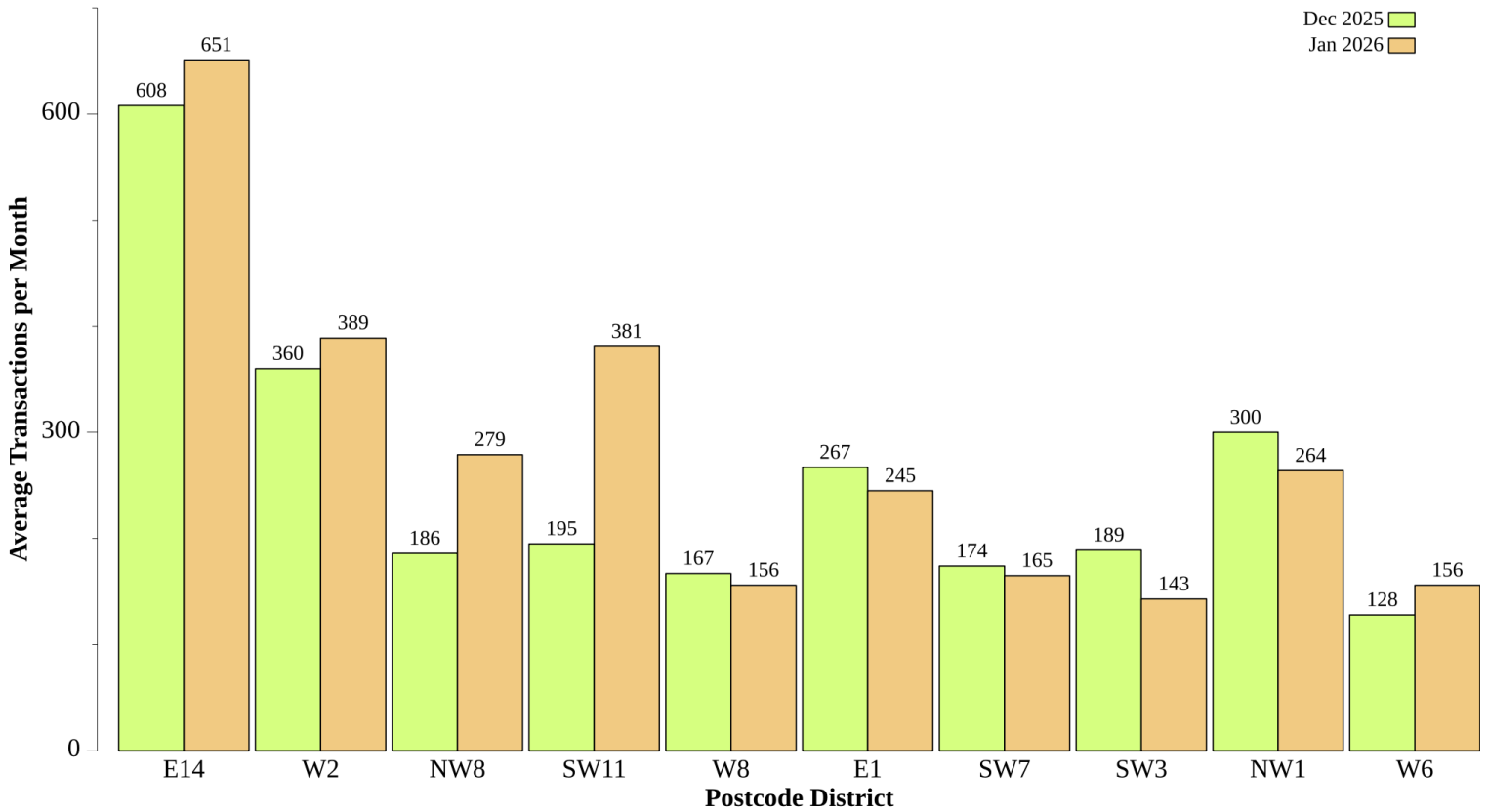
Comparison: Dec 2025 vs Jan 2026

Comparison of Properties for Rent in Top 10 Districts - December 2025 vs January 2026

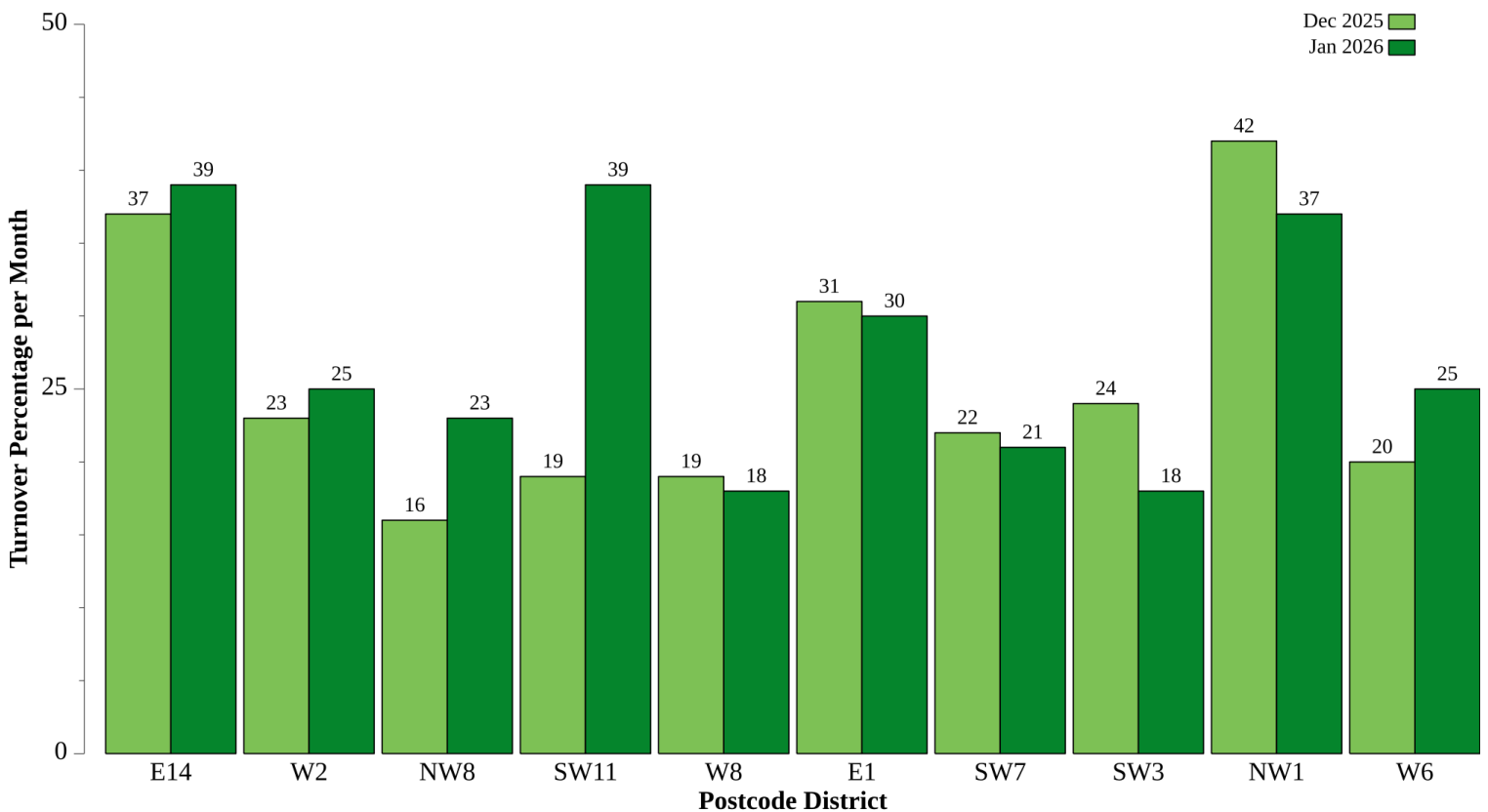


The December–January shift shows a clear post-holiday re-acceleration in core rental districts, while prime areas remain subdued. E14 and SW11 strengthened notably, with higher transactions and turnover despite flat or falling stock, signalling renewed demand momentum into January. W2, NW8 and W6 also improved turnover as supply adjusted, suggesting seasonal re-engagement rather than structural weakness. In contrast, W8, SW7 and SW3 saw little improvement or outright softening, indicating that prime markets did not experience the same January bounce. Overall, liquidity returned where demand is employment-led and price-aligned.

Comparison of Average Transaction per Month in Top 10 Districts - December 2025 vs January 2026



Comparison of Turnover Percentage per Month in Top 10 Districts - December 2025 vs January 2026



Insights - January 2026

Market Trends and Dynamics

The market is splitting by depth of tenant pool rather than by rent level. Areas like E14, SW11 and NW1 clear quickly even with heavy supply because demand is broad and recurring, while W8, SW3 and SW7 depend on a narrow, high-budget segment that slows absorption. The key driver is not price alone, but how many tenants can realistically afford that price.

Market Fluctuations and Variability

Seasonal slowdowns affect prime districts more sharply because their tenant base is discretionary and mobile, leading to longer marketing times and higher inventory sensitivity. Volume districts show more stable turnover, meaning small pricing shifts create quick adjustments rather than prolonged vacancies. Variability is therefore higher at the top end, even when stock levels look similar.

Market Possibilities and Opportunities

Opportunity sits where turnover is strong but rent spreads remain controlled, suggesting room for modest pricing growth without breaking absorption. In high inventory prime areas, the advantage lies with tenants and negotiators, as time pressure builds before landlords adjust expectations. Investors seeking resilience should prioritise depth of demand over headline rent, as liquidity ultimately protects income stability.