



# **Analytical Report**

Rent Market Analysis (October, 2025)

Greater London

Intelligence Team

## Overview

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

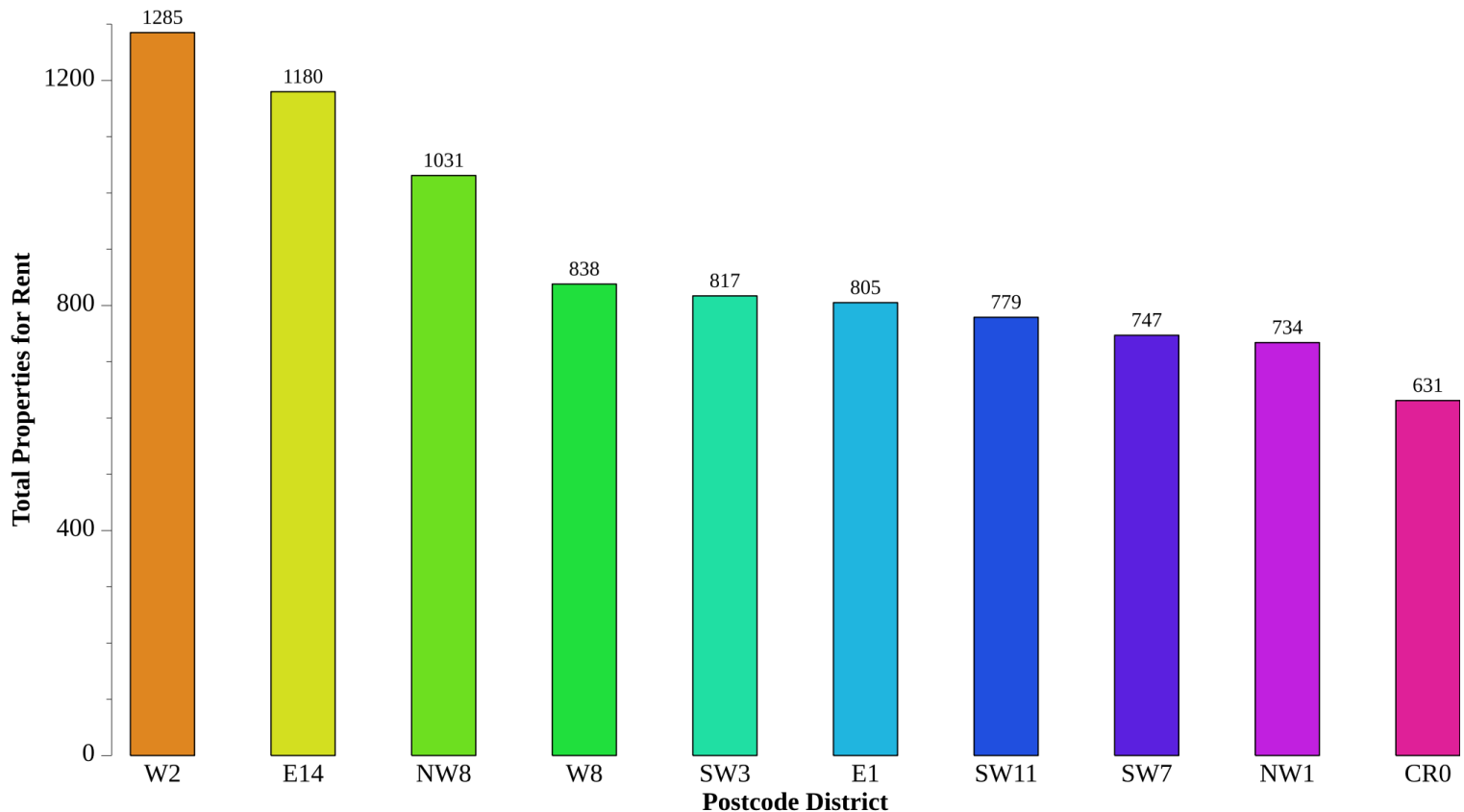
## Key Metrics

- 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

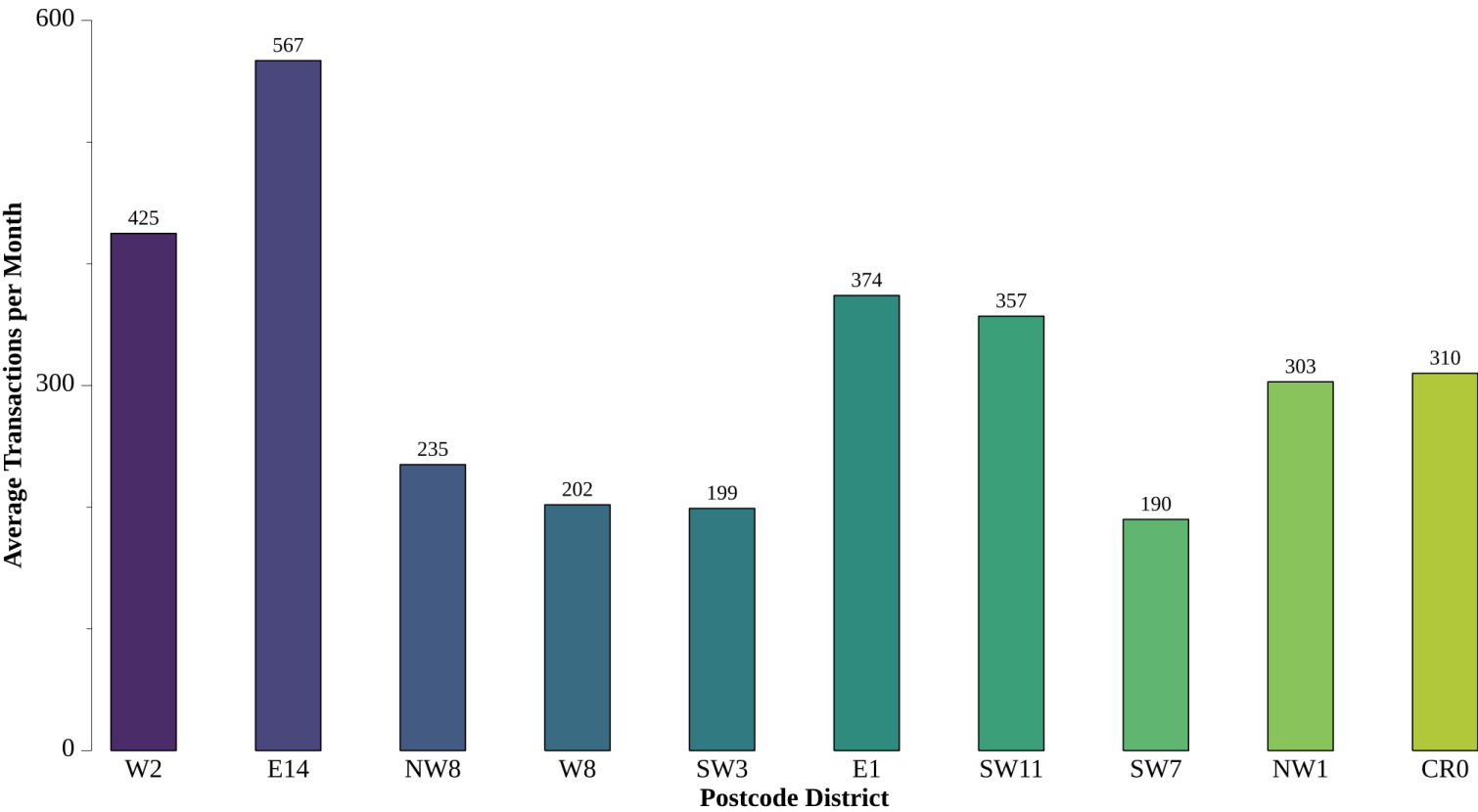
The following analysis provides an overview of the rental market in several postcode districts for October 2025.

Total Properties for Rent in Top 10 Districts - October 2025



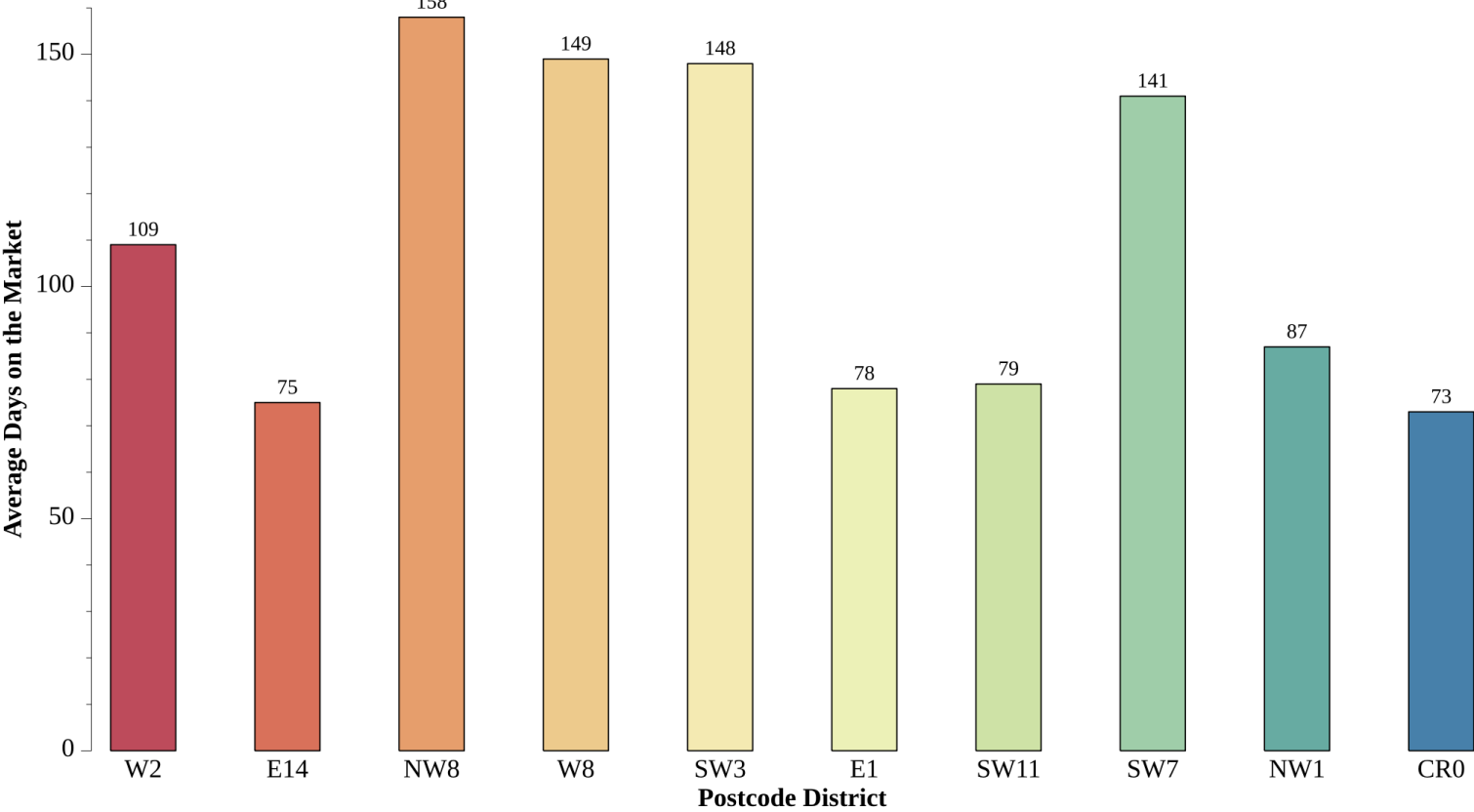
The October market shows areas with grounded, livable pricing (E14, E1, SW11, CR0) are pulling in a large share of fresh activity, proving that demand isn't just strong, it's decisive, with renters acting quickly when price and location align. Meanwhile, premium districts (W8, SW7, NW8, SW3) are steady but cautious; their high mean, median gaps suggest renters are resisting top-end prices and gravitating toward more "sensible luxury" within each area. What stands out is that the market's power isn't simply in high demand, it's in selective demand.

Average Transactions per Month in Top 10 Districts - October 2025



Postcode District	Turnover (%) per Month
W2	33
E14	48
NW8	23
W8	24
SW3	24
E1	46
SW11	46
SW7	26
NW1	41
CR0	49

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

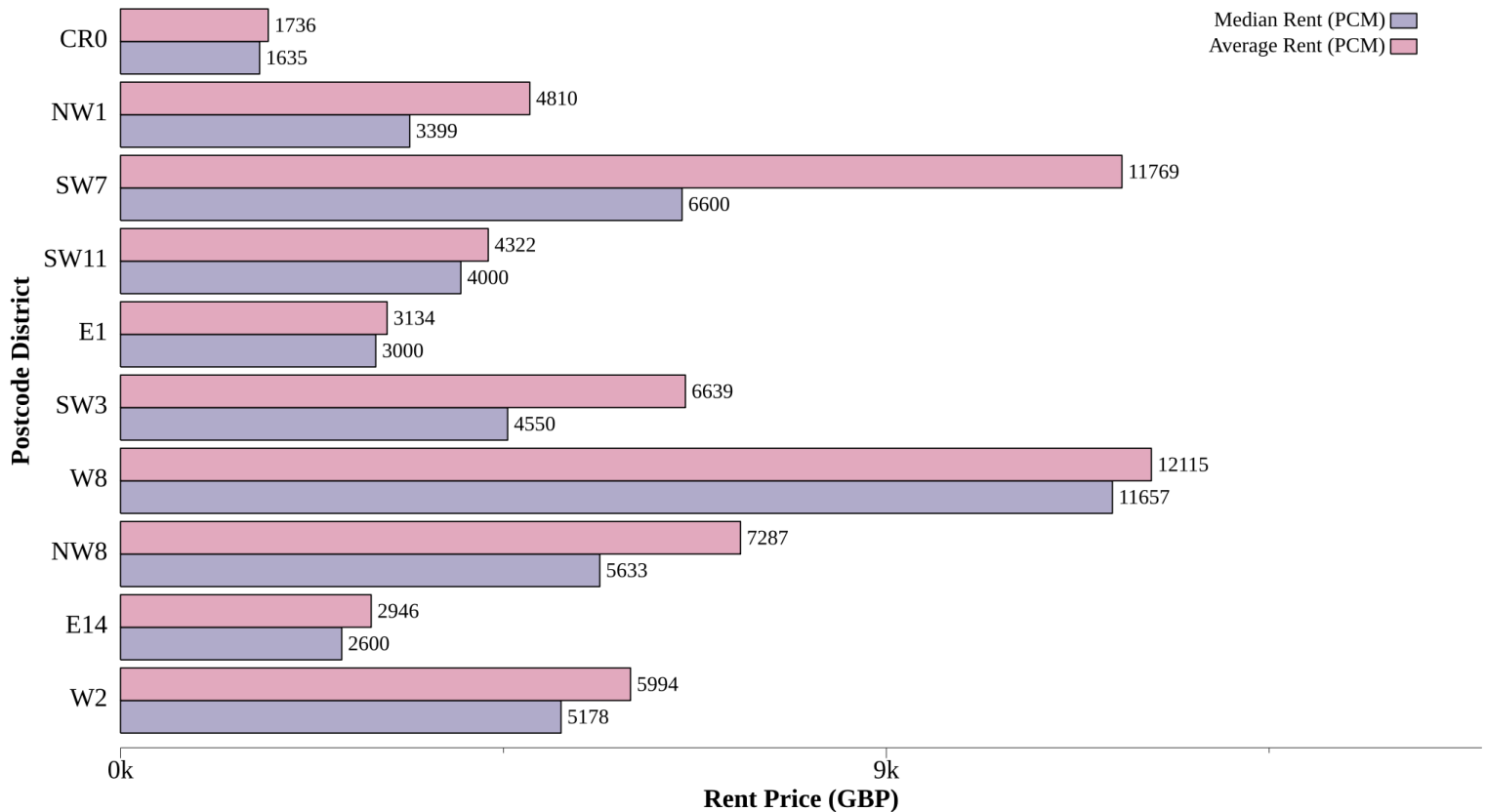


Postcode District	Months of Inventory
W2	3
E14	2.1
NW8	4.4
W8	4.1
SW3	4.1
E1	2.2
SW11	2.2
SW7	3.9
NW1	2.4
CR0	2

## Average & Median Prices Analysis

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

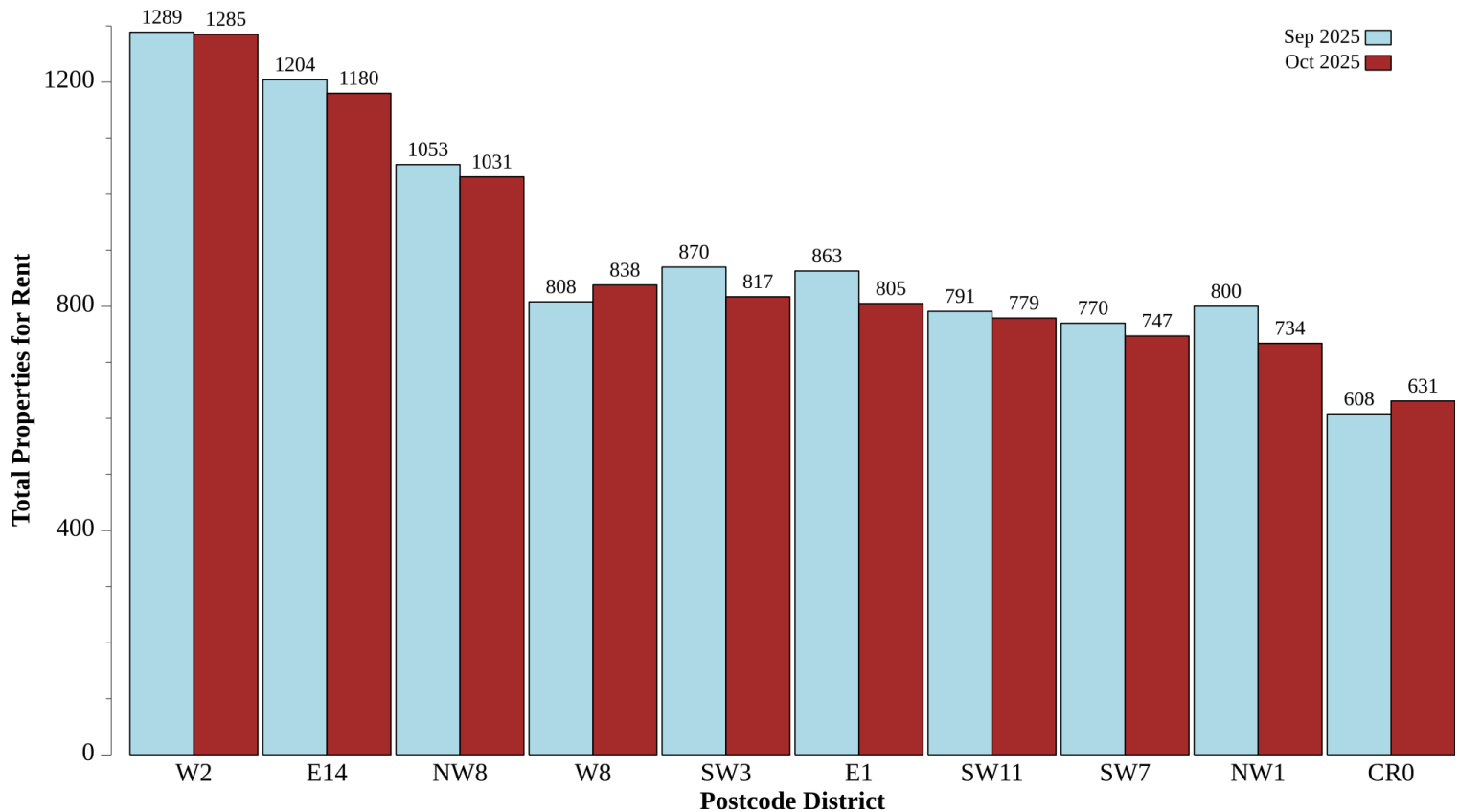
Average and Median Rent Prices (October 2025)



The gap between mean and median rents reveals how much real pricing power landlords truly have: high end areas with big gaps(W2, NW1, SW7) show landlords listing high but renters settling closer to the median, signalling soft demand at the top. In mid priced areas with tight spreads(E14, E1) show clearer renter expectations and quicker deal flow, which is why they hold stronger landlord ratings despite lower rents. In short, premium markets look flashy but shaky, while mid-range markets quietly deliver the strongest real leverage for landlords.

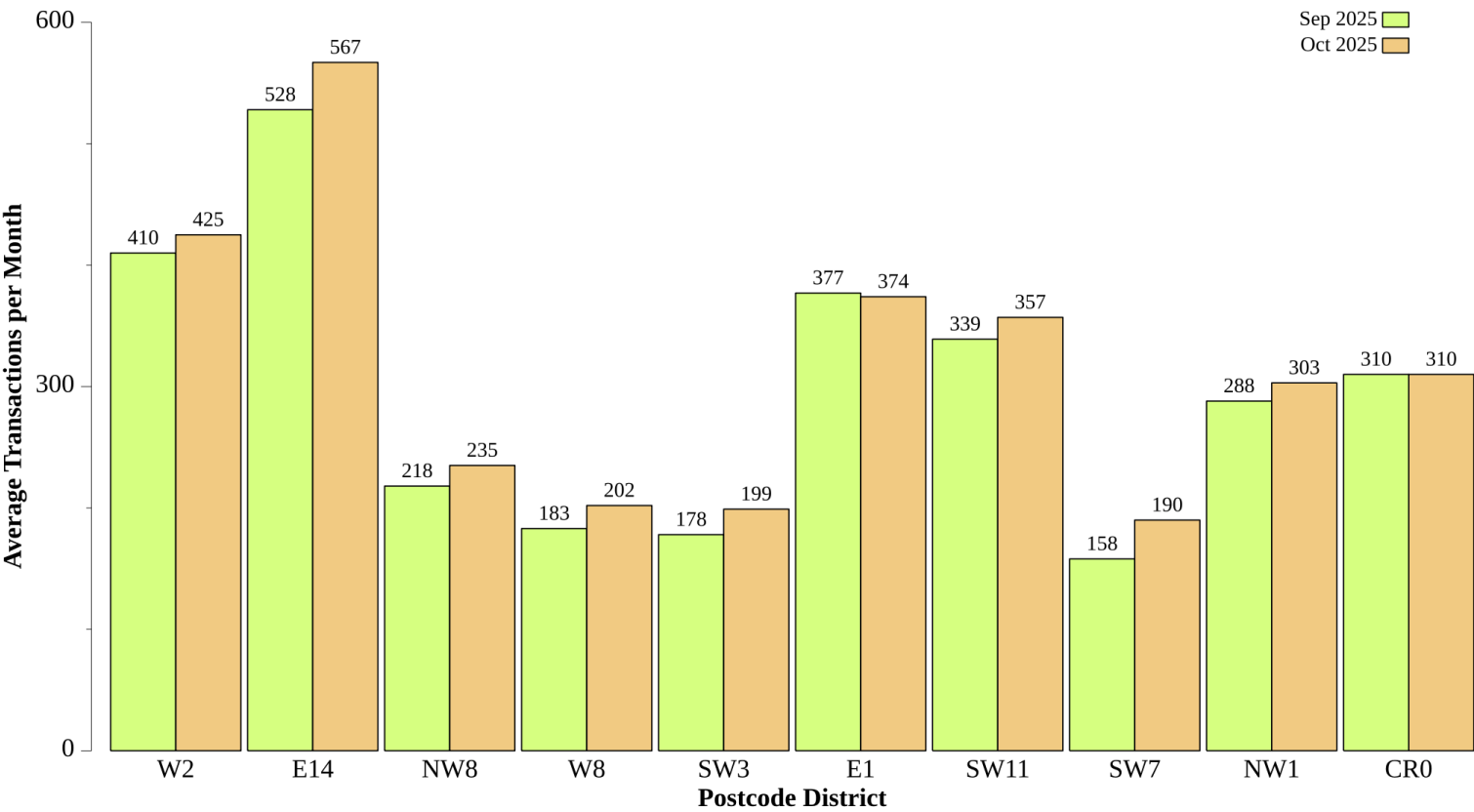
## Comparison: Sep 2025 vs Oct 2025

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

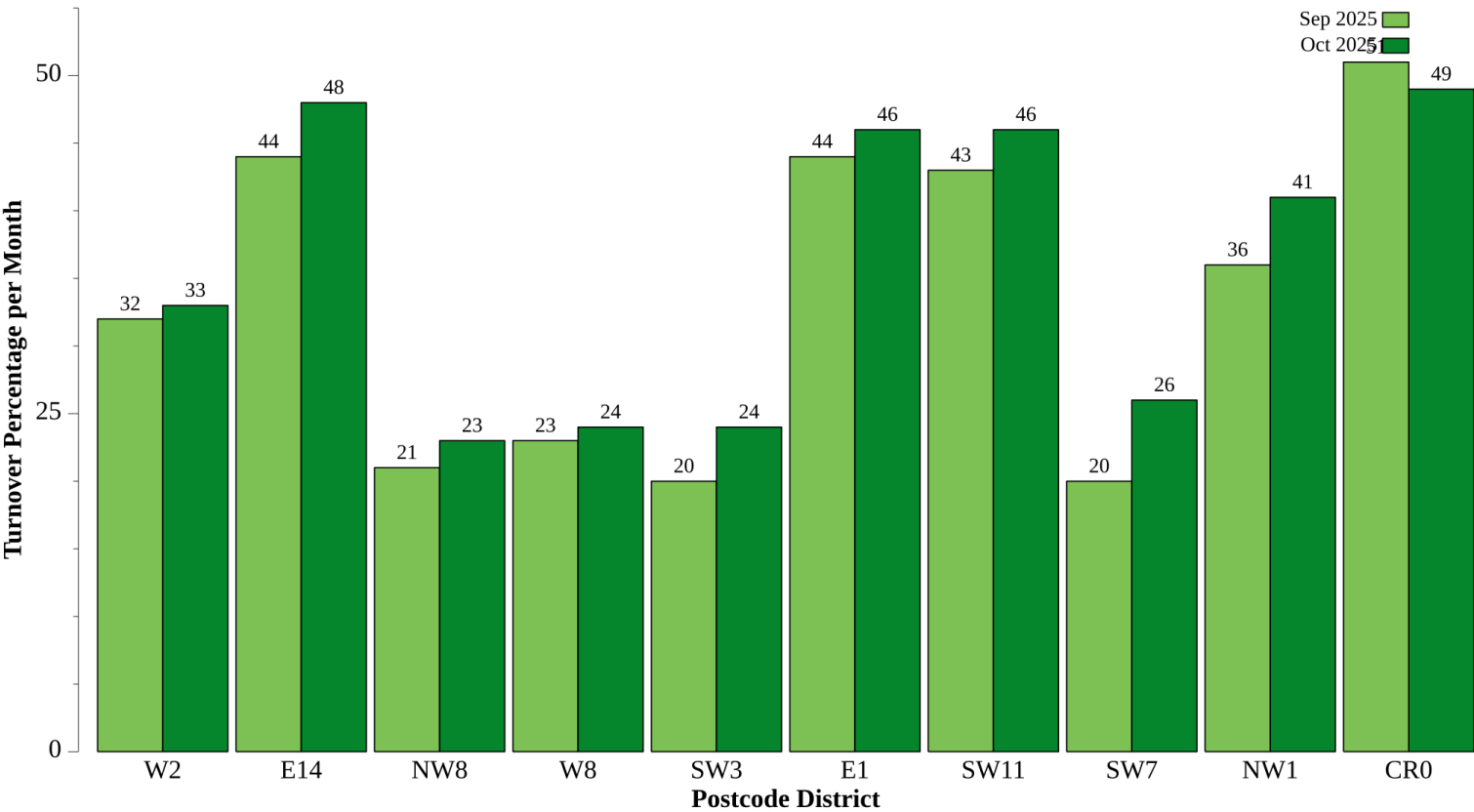


From Sep to Oct, the market didn't swing in sentiment but grew sharper in behaviour, lower or steady stock paired with higher turnover shows renters acting faster and landlords holding firm. Areas like SW7 and NW1 signal rising urgency with fewer listings but more deals, while places like E14 and SW11 keep functioning as high-flow markets where confidence drives constant movement. The real shift isn't in rating changes but in momentum: demand is becoming more decisive, and supply isn't rushing to catch up.

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



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





## **Insights – October 2025**

### Market Trends and Dynamics

The market is splitting into two clear speeds: fast moving, mid-priced districts and slow-moving, high-end pockets. Areas like E14, E1, SW11, and CR0 move quickly not because they're cheap, but because their prices sit close to what renters feel is "fair," shown by tight mean, median gaps and short days-on-market. Meanwhile, premium districts such as NW8, W8, SW3, SW7 are carrying a price disconnect: high means inflated by luxury stock, but medians showing where real demand settles. This creates a quiet tension where landlords are confident, but renters are cautious, stretching out time on market.

### Market Fluctuations and Variability

Volatility isn't coming from price swings but from how unevenly stock is converting. Districts with similar inventory levels behave completely differently: NW8 sits on 4.4 months of supply while E14 turns nearly half its stock monthly. This mismatch suggests renters aren't rejecting high end areas, they're filtering aggressively, only moving when value matches expectations. The slow markets aren't "cold"; they're stuck in a negotiation loop, where price anchoring in luxury zones stops natural flow, creating larger mean–median gaps and longer stalling cycles.

## Market Possibilities and Opportunities

Opportunities lie where the market is mispriced, not where it's cheapest. High-end districts with big mean, median gaps (SW7, NW1, SW3) signal room for strategic negotiation or repositioning, small pricing tweaks could unlock faster absorption. Fast markets like E14 and CR0 offer reliable demand cycles, ideal for landlords prioritising low vacancy over premium pricing. The overlooked window sits in "in-between" zones like W2 and SW11: markets strong enough to move, but with just enough pricing stretch to offer upside if stock is refreshed or slightly repositioned.