



Analytical Report

Sale Market Analysis (November, 2025)

Greater London

Intelligence Team

Overview

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

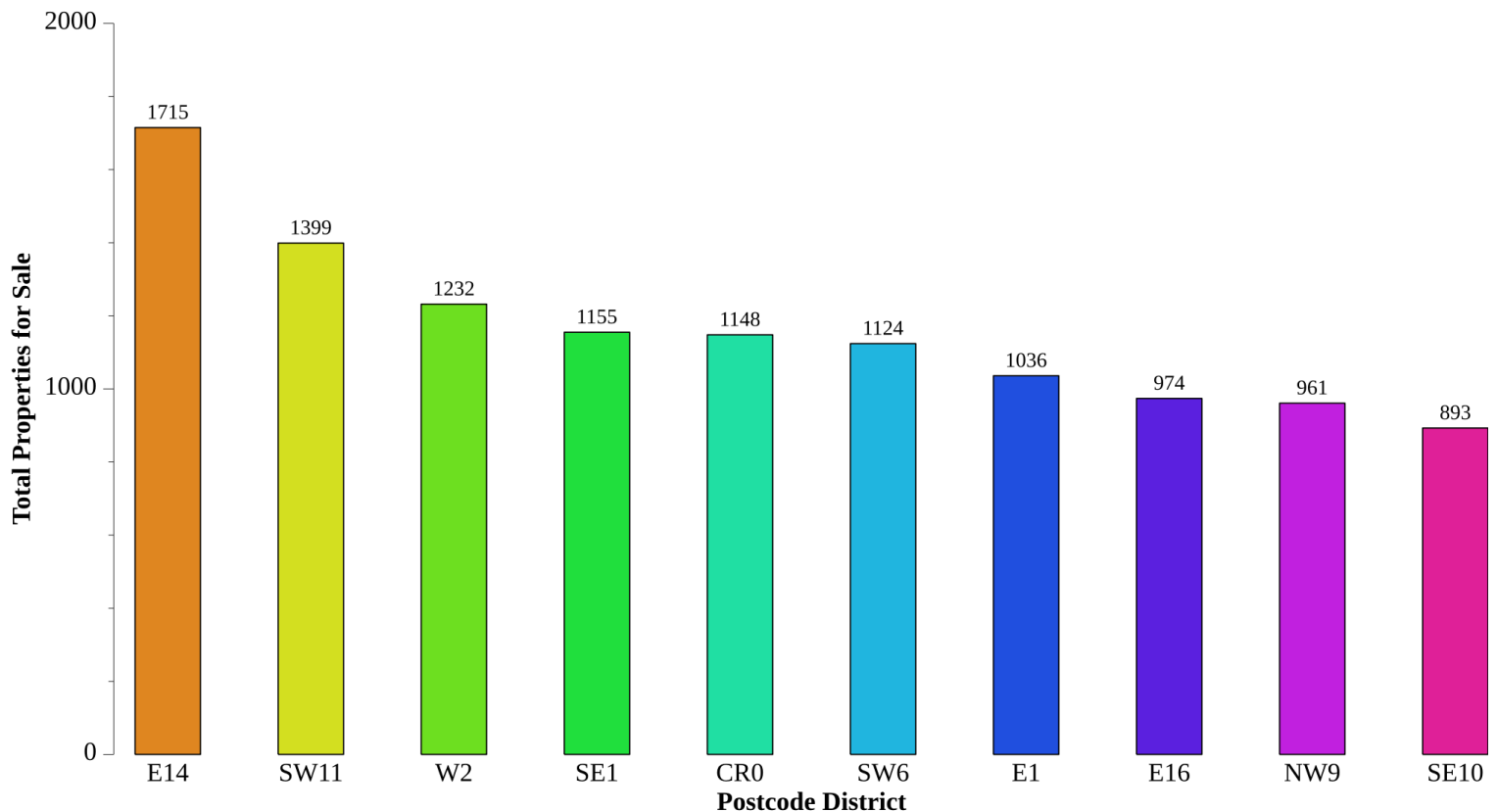
Key Metrics

- 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

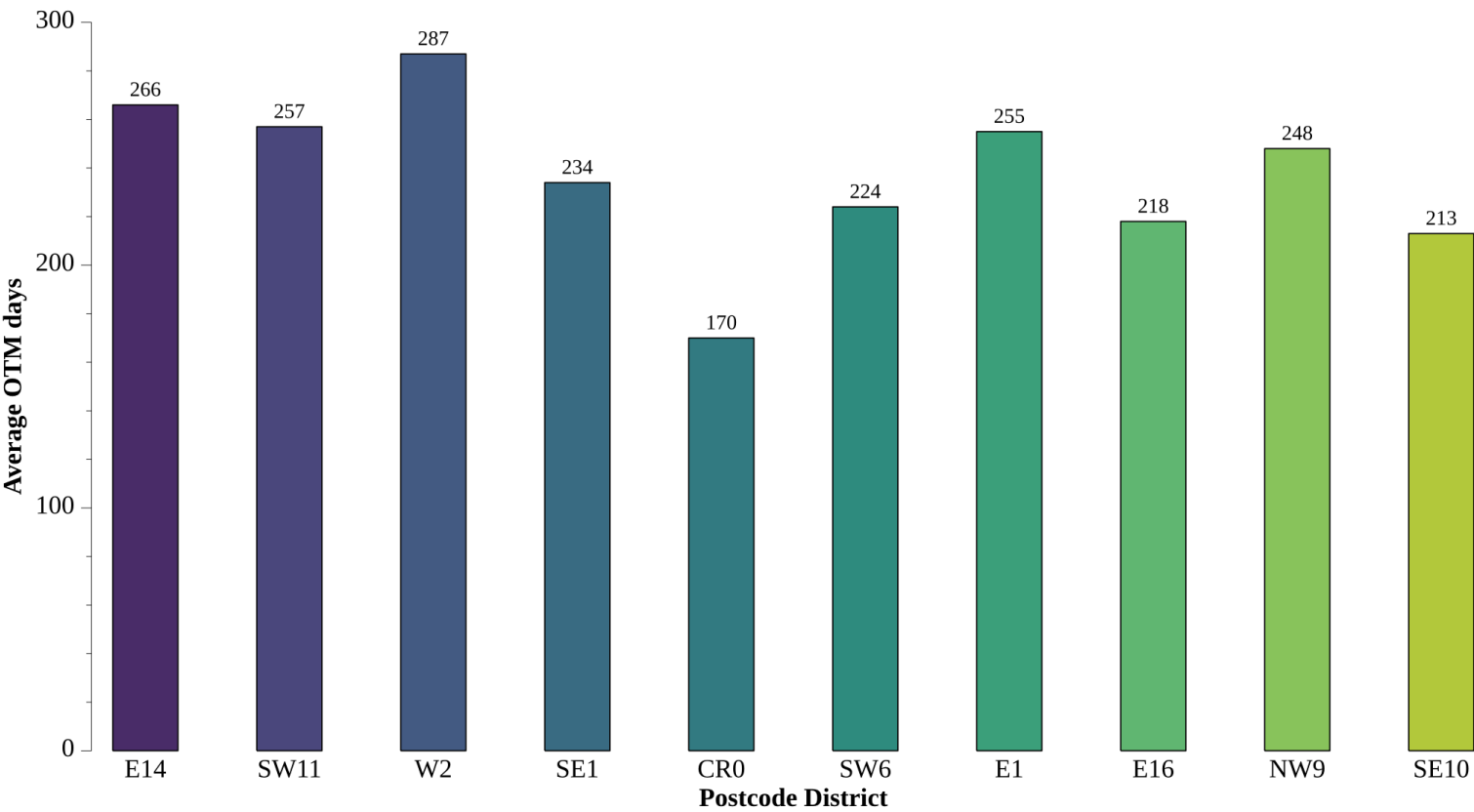
The following analysis gives an overview of how the sale market appears to be in some of the postcode districts for November 2025.

Total Properties for Sale in Top 10 Districts - November 2025

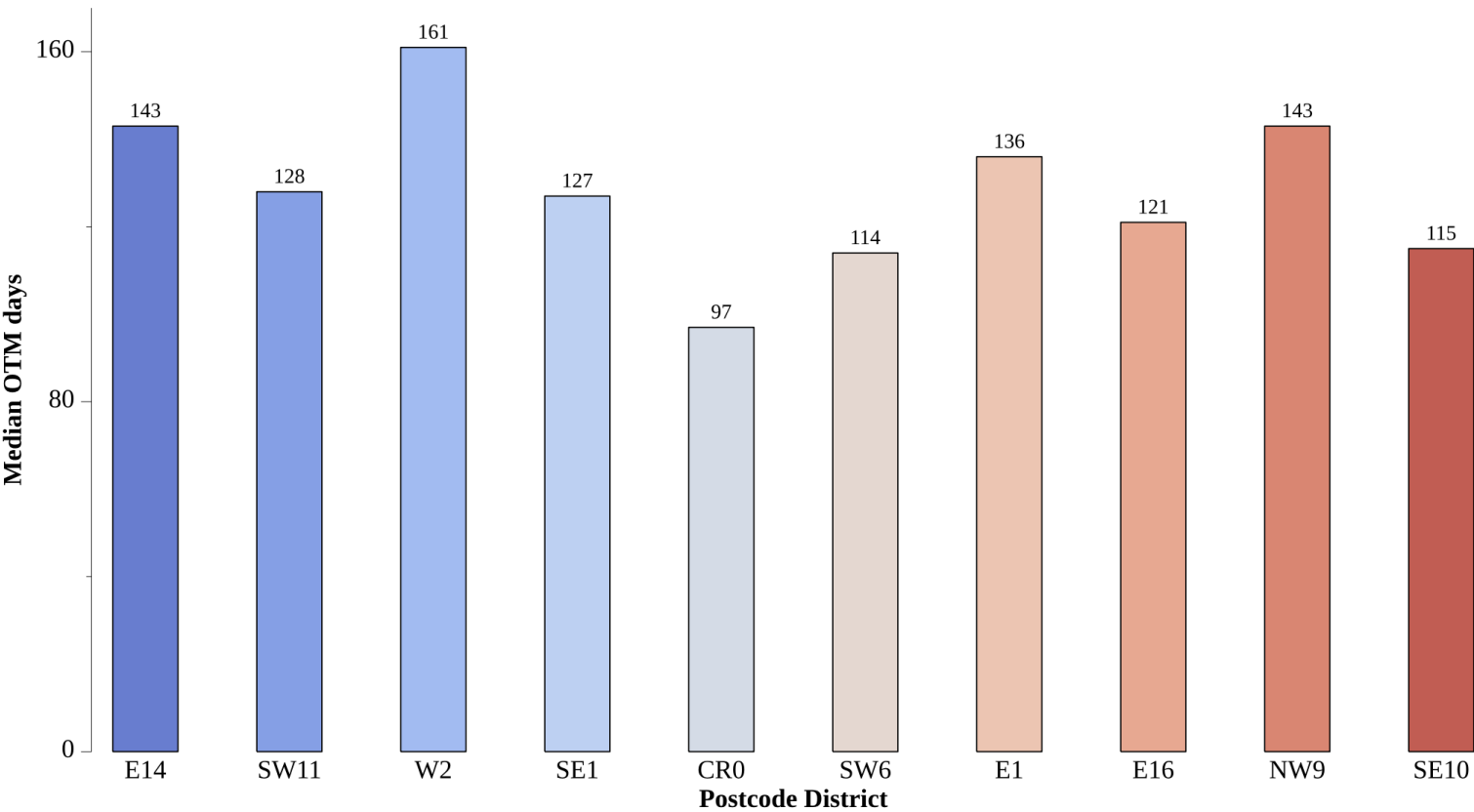


In November 2025, areas with realistic pricing and strong demand (CR0, SE10, SW11, SW6) are turning stock quickly, keeping inventory tight and signalling confident, motivated buyers. Meanwhile, higher-priced districts such as W2, E1, and NW9 see longer selling times, suggesting buyers there are cautious and only moving when value is clear. With fresh listings still flowing in especially in places like E14 the market isn't weakening; it's filtering, rewarding well-priced homes and leaving overpriced stock to sit until sellers adjust.

Average OTM days in Top 10 Districts - November 2025



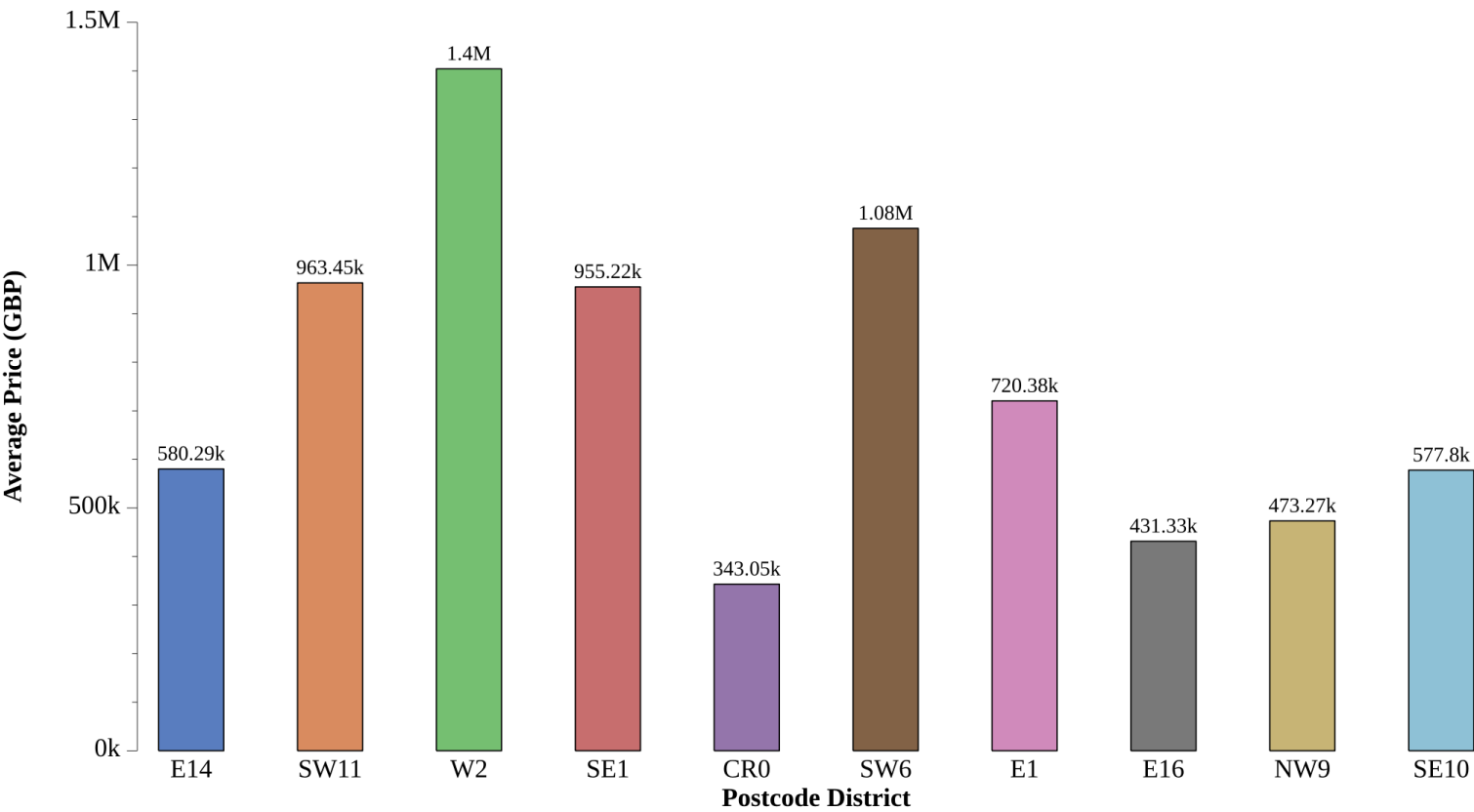
Median OTM days in Top 10 Districts - November 2025



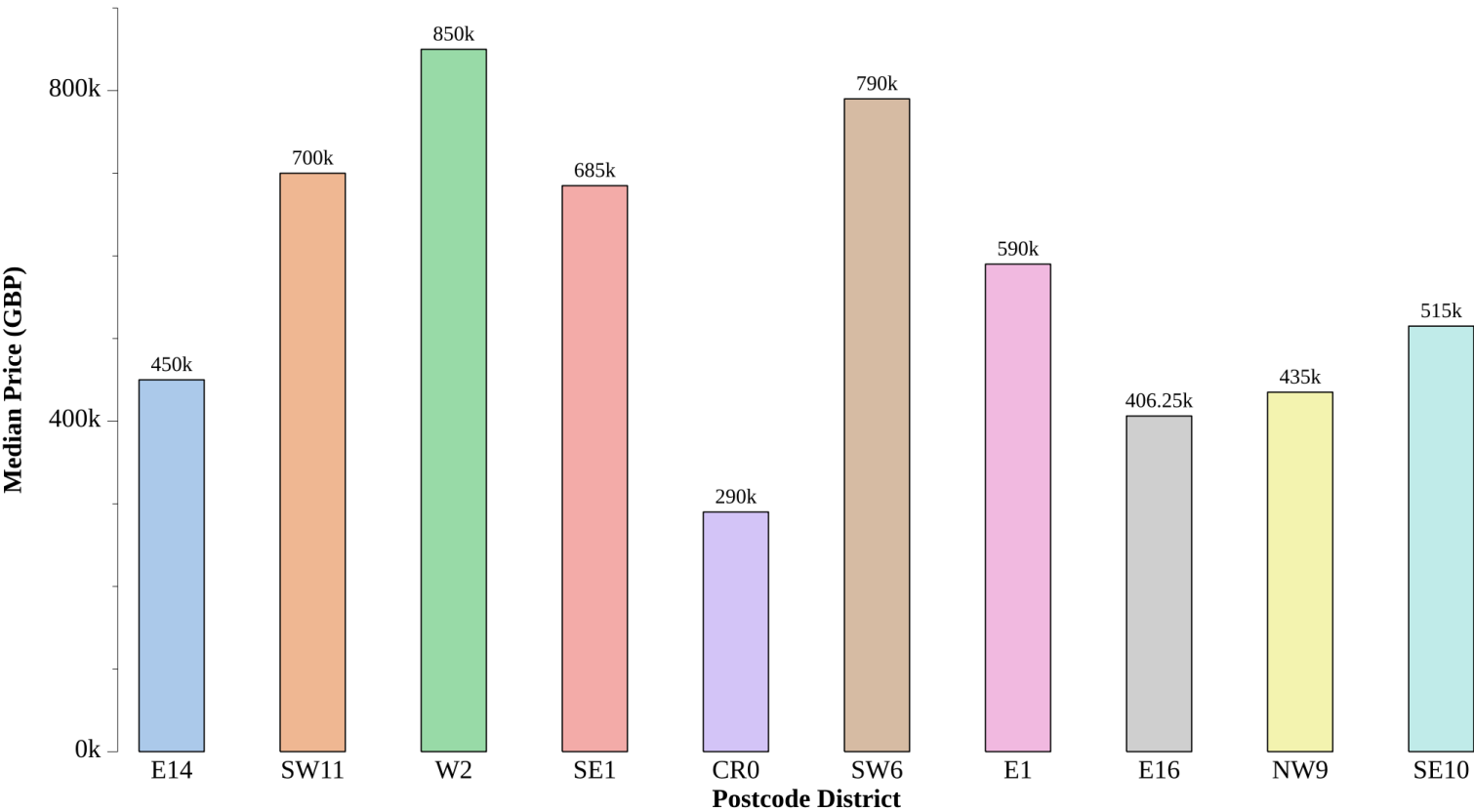
Across these districts, the gap between mean and median time on market quietly exposes how pricing confidence shapes momentum: places with wide spreads and long mean OTM days show a chunk of overpriced homes dragging in the background, even if well-priced listings move faster. Areas where median OTM sits far below the mean, like SW11, SE10, and CR0, hint at a two speed market: good stock gets picked up quickly while stale, mispriced listings linger. Meanwhile, districts with both high OTM days and long overall market times, such as W2 and E1, signal buyer hesitation, not due to lack of demand, but because value feels harder to justify at current price levels. In short, the market's real story isn't just how long homes sit, but how unevenly they move, showing where pricing is aligned with reality and where sellers are still testing the ceiling.

The gap between mean and median prices quietly shows how pricing shapes market tone: where the mean sits far above the median, it often signals sellers aiming high while buyers stay cautious, pushing markets toward buyer's conditions and lengthening time on market. In contrast, areas with tighter price alignment feel more grounded, allowing demand to meet supply more naturally and supporting stronger turnover and healthier ratings. High spreads don't just reflect expensive home, they reveal uncertainty, slower movement, and room for negotiation, while tighter spreads point to clearer value and faster decisions.

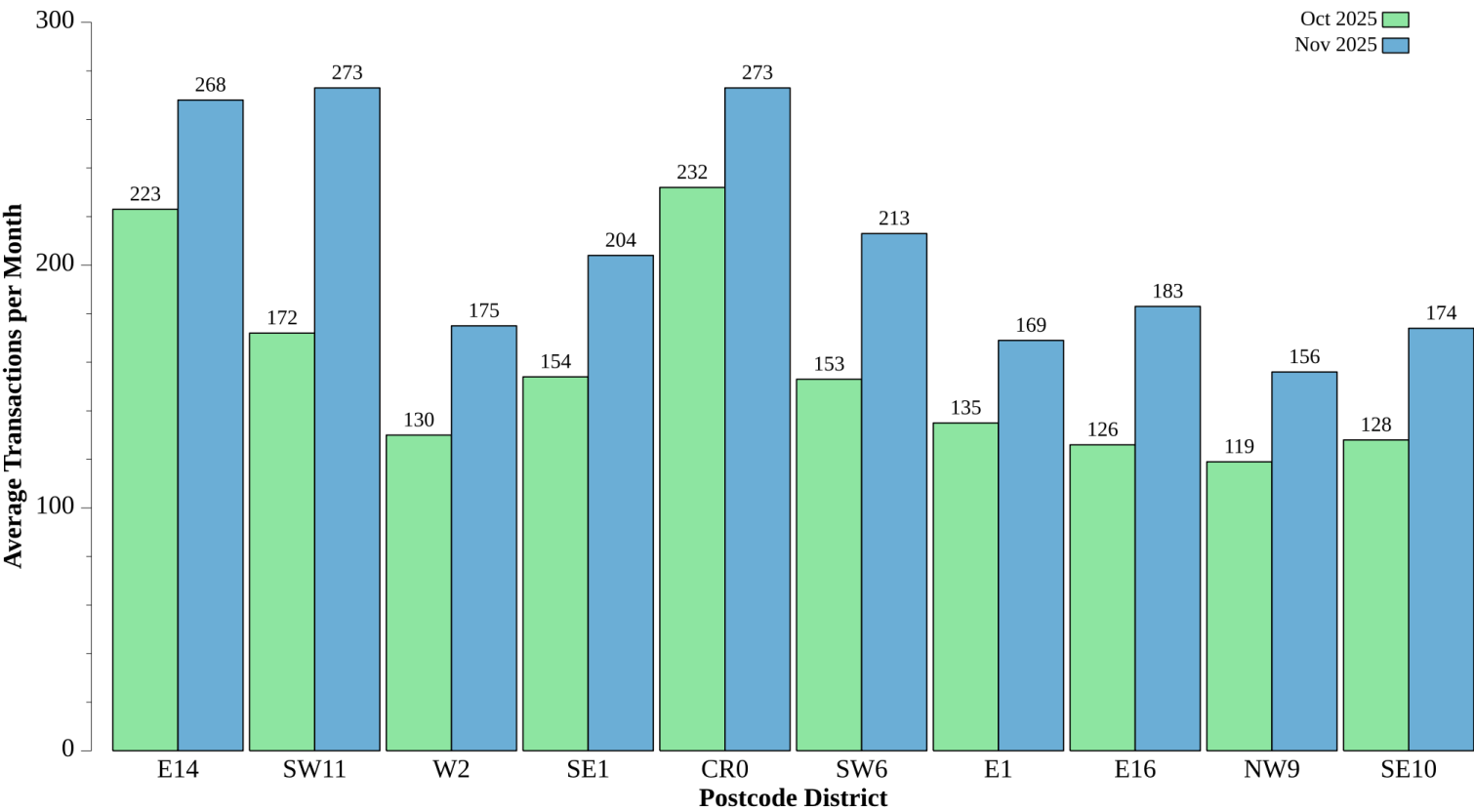
Average Price in Top 10 Districts - November 2025



Median Price in Top 10 Districts - November 2025



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



Across these districts, the story is one of rising momentum: even as the number of listings generally tightens from October to November, transactions accelerate sharply, lifting turnover rates and revealing stronger buyer engagement rather than simple supply shifts. Markets like CR0 and SW11 show the clearest signs of demand outpacing stock, while traditionally slower, higher-priced areas such as W2 and E1 still register meaningful improvements, suggesting that confidence is broad based, not isolated. Overall, the pattern reflects a market where buyers are becoming more decisive, sellers are adjusting expectations, and liquidity is improving across both affordable and premium segments.

Insights – November 2025

Market Trends and Dynamics

The market is quietly shifting from passive supply heavy conditions toward more active buyer engagement, even though days-on-market remain long in many places. Areas with high prices and slower turnover (like W2 and E1) show signs of value-testing, where buyers are willing to engage but only at realistic price points, reflected in wide gaps between mean and median prices. Meanwhile, mid-priced districts like CR0, SE10, and SW11 show tighter months of inventory and stronger transaction flow, signalling a more confident, fluid market where both buyers and sellers are adjusting faster. Overall, the market is balancing itself not by big swings in stock, but by buyers becoming more selective and sellers becoming more flexible.

Market Fluctuations and Variability

The real variability is not in the number of properties available but in how quickly different price segments are moving. High-end districts show slower digestion of stock, where properties sit longer because price expectations lag behind buyer sentiment. In contrast, more affordable or mid-tier zones see faster turnover, suggesting that small pricing shifts here can trigger large jumps in activity. The gaps between mean and median prices reveal internal mini-markets: premium listings pull up averages but move slowly, while realistically priced properties move quickly, creating a dual-speed environment within the

same district. This uneven pace is the hidden variability shaping local behaviour more than headline supply numbers.

Market Possibilities and Opportunities

Opportunities emerge where pricing realism, liquidity, and buyer interest overlap. Districts like CR0, SE10, and SW11 offer the strongest signals of genuine movement, lower days on market, healthier turnover, and median prices that align closely with what buyers are willing to pay. These areas are becoming efficiency zones, where fair pricing leads to quicker deals and less negotiation friction. In higher-priced districts, the opportunity lies not in quick sales but in negotiation leverage: long days on market and buyer driven ratings suggest room for significant price discussions, especially where the median is far below the mean. For investors, the market favours districts where liquidity is quietly accelerating and those are mostly in the mid-tier, not the luxury tiers.