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Analytical Report

Sale Market Analysis(January, 2025)

Intelligence Team

Overview

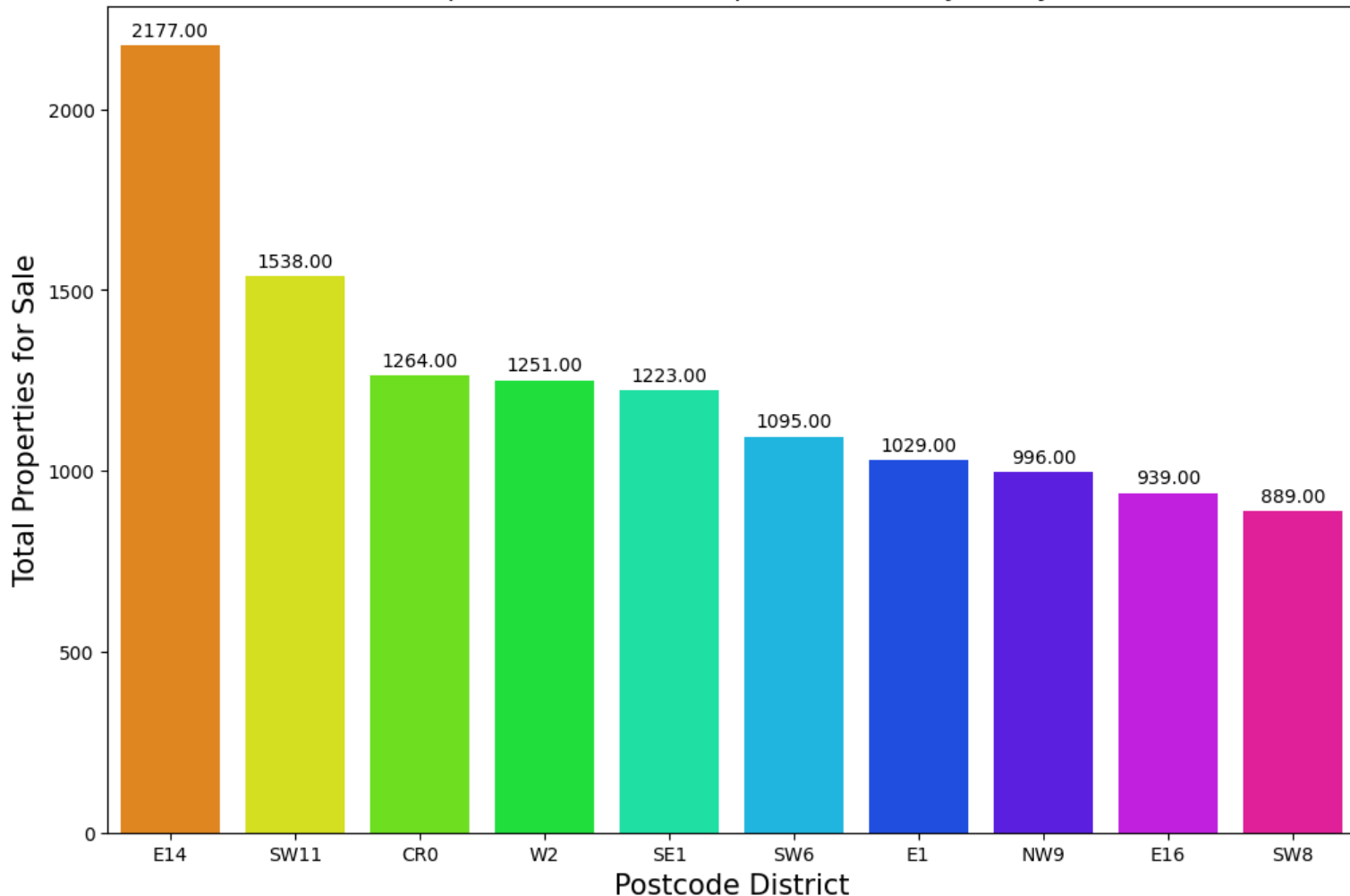
The following report represents information on sale properties in various postcode districts in London.

Key Metrics

- Total properties for sale: This value indicates the total number of properties available on the market for sale in a month.
- Average transaction 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(OTM): 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.

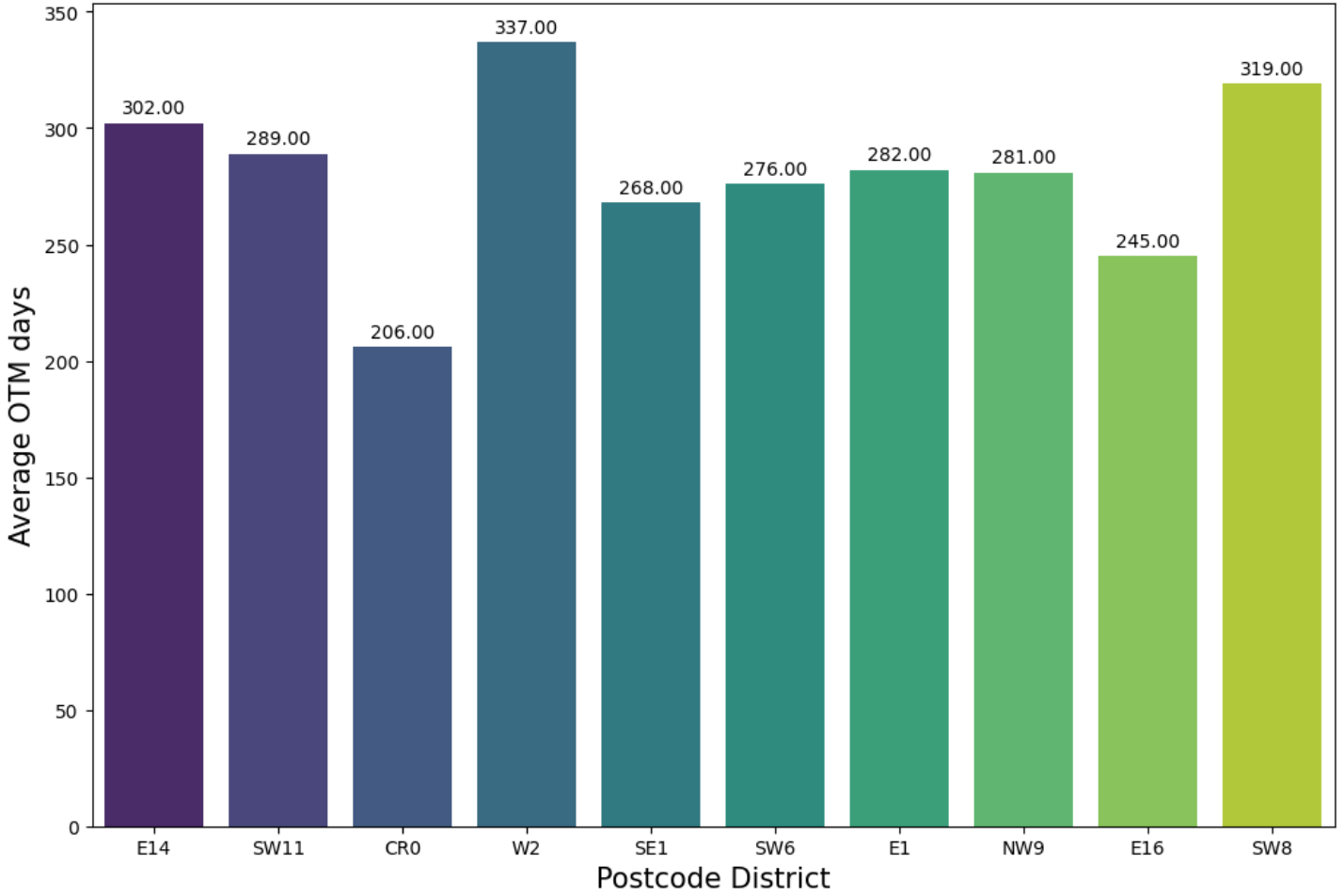
High-level Analysis: The following analysis gives an overview of how the sale market appears to be in some of the postcode district in the month of January, 2025.

Total Properties for Sale in Top 10 Districts - January 2025

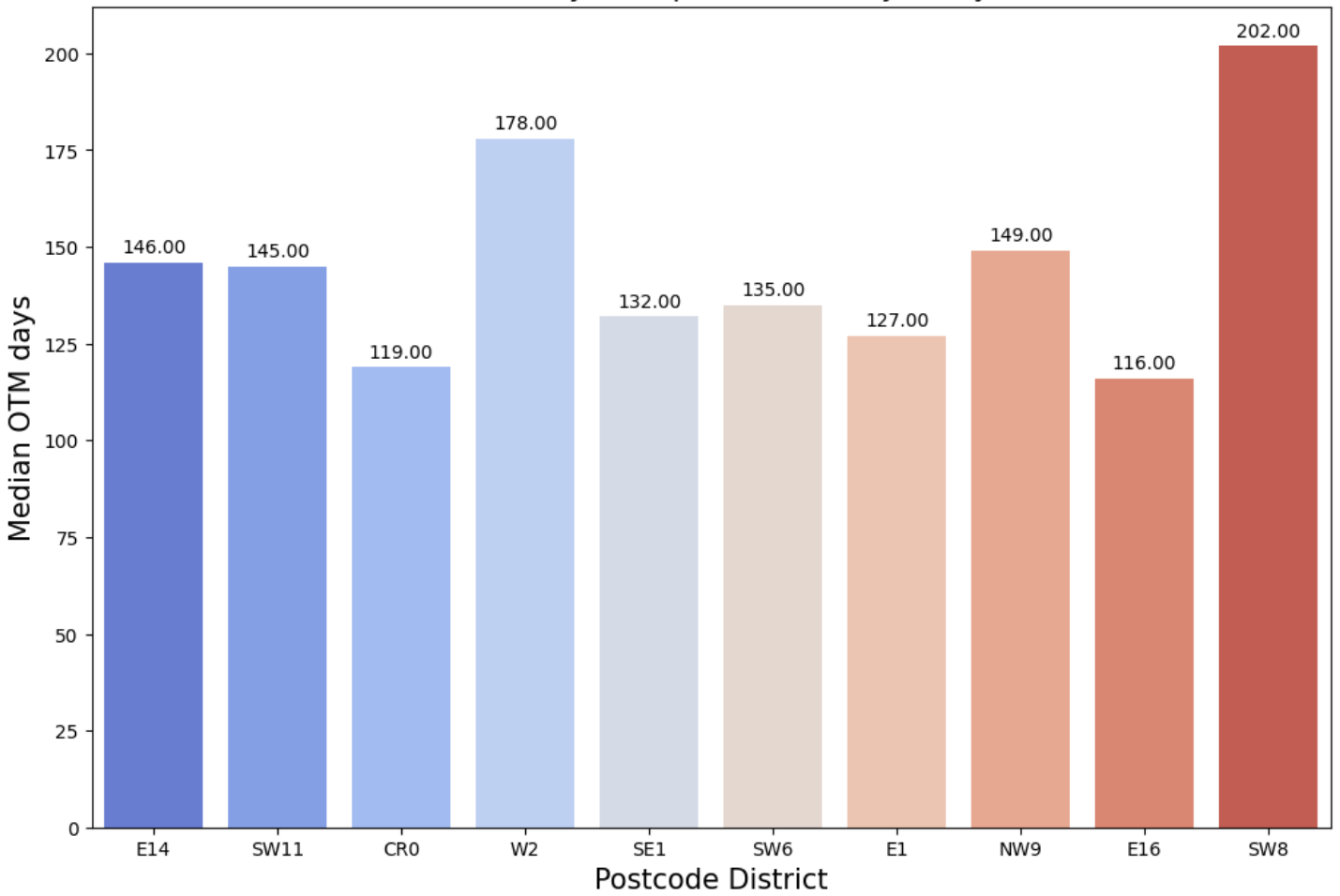


In January 2025, the market for properties for sale is largely tilting in favour of buyers, with most districts offering a robust supply that empowers buyers with greater negotiation leverage. While the majority of areas are clearly characterised as a buyer's market, indicating ample opportunities for favourable purchases, one district stands out with a balanced rating, suggesting that market dynamics there are more stable and may require a different approach. Overall, this trend underscores a prevailing environment where buyers have the upper hand, although localised nuances hint at the potential for tailored strategies depending on the specific district dynamics.

Average OTM days in Top 10 Districts - January 2025



Median OTM days in Top 10 Districts - January 2025

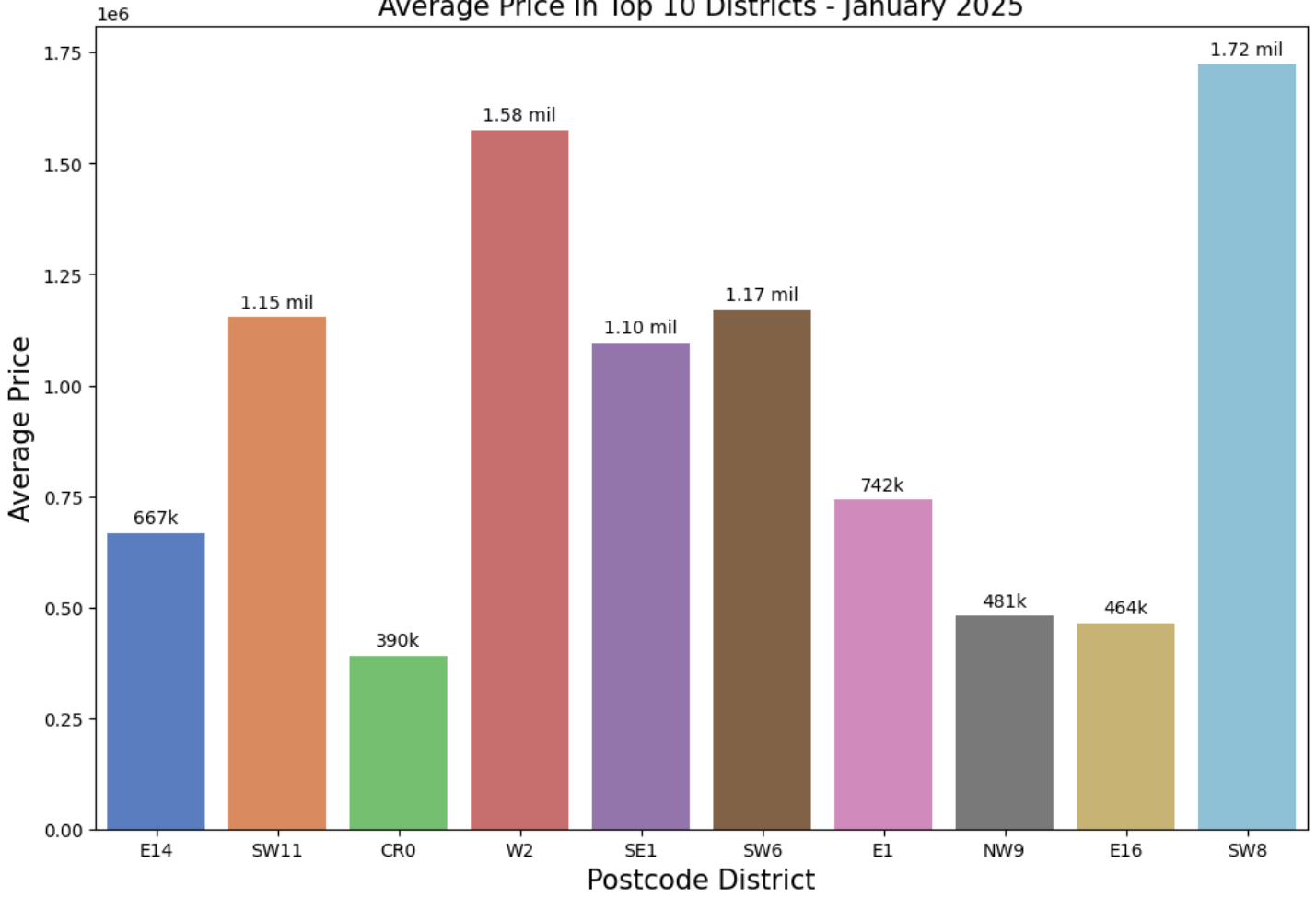


Across the districts, the data reveals a distinct pattern where the average time on market is consistently higher than the median, suggesting that while most properties sell within a relatively moderate timeframe, a subset takes significantly longer, thereby pulling the average upward. This skewed distribution indicates that in certain markets, the majority of properties move briskly while a few linger, hinting at occasional bottlenecks possibly due to pricing strategies, property condition, or local demand fluctuations. Some districts exhibit a notably shorter median turnaround, reflecting a more vibrant and competitive market, whereas others show extended selling periods that may require a more nuanced approach to pricing and marketing.

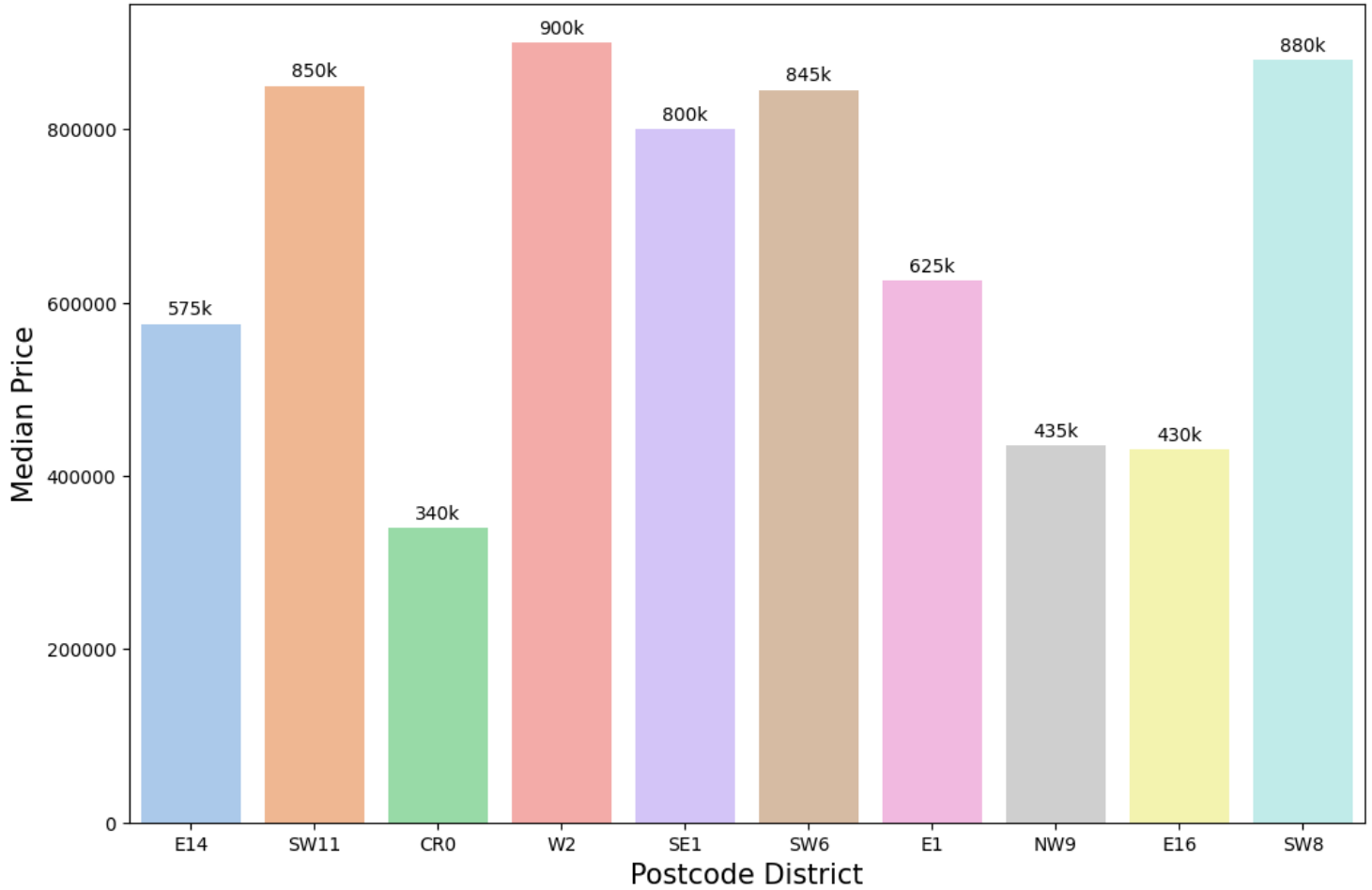
These insights underscore the variability in market behaviour across different regions. In areas with lower median days, the pace of transactions points to high buyer engagement and efficient sales cycles, creating opportunities for sellers to capitalise on swift turnovers. Conversely, districts with higher median values might present unique opportunities for buyers and investors, who could potentially negotiate better deals in a slower market environment. Overall, the contrast between mean and median days on market provides a deeper understanding of the underlying dynamics, highlighting both the robust areas of demand and the segments where market acceleration might be needed.

The January 2025 pricing data underscores significant regional disparities that shape market opportunities. The contrast between districts with higher mean prices—driven by a select number of upscale properties—and those with a more uniform pricing profile emphasises the importance of local market dynamics. This nuanced landscape provides valuable insights for both buyers and sellers: premium markets offer enticing prospects for high-end investments, while more balanced areas cater to a broader audience. Overall, understanding these trends can help stakeholders tailor their strategies to align with the specific characteristics of each district, ultimately enabling more informed and effective decision-making in the property market.

Average Price in Top 10 Districts - January 2025

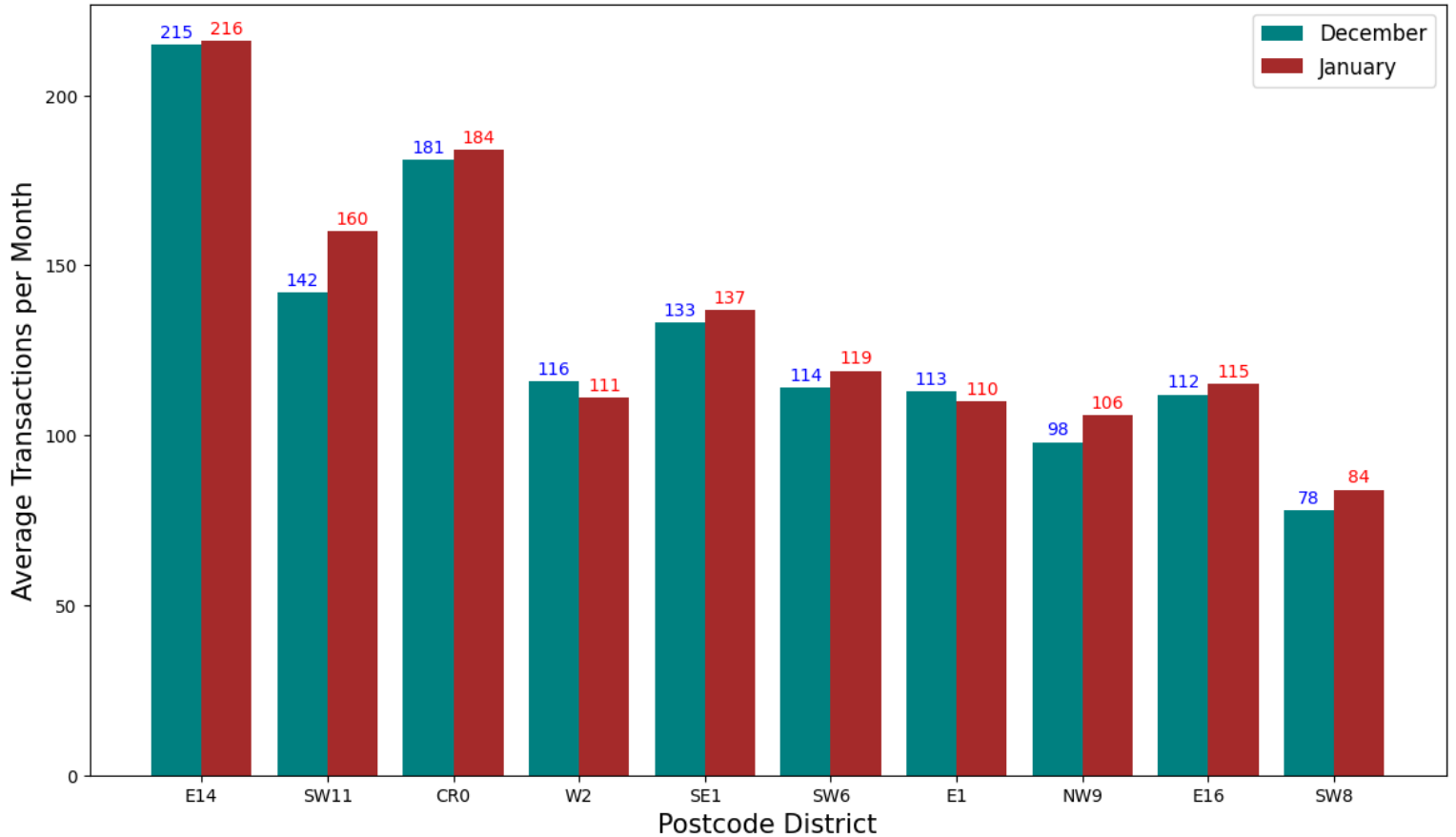


Median Price in Top 10 Districts - January 2025



Comparison: Dec 2024 vs Jan 2025

Comparison of Average Sale Transactions per Month in top 10 districts - December 2024 vs January 2025



In reviewing the latest data, we see a modest shift in the property sales market from December 2024 to January 2025 that aligns with our 2024 yearly report forecasts. Our forecast model had anticipated that after a slight cooling in December, the market would only soften up in January with marginal improvements. This is reflected in the relatively stable total listings across districts—where, for example, one district saw a gentle rise in available properties—and a subtle increase in average transactions in several areas, indicating a cautiously optimistic uptick in market activity.

Moreover, the turnover percentages remain largely consistent between the two periods, suggesting that while buyer activity is incrementally increasing, the overall pace of sales remains steady. This stability, coupled with minor improvements in transaction volumes in districts like SW11 and SE1, confirms our expectation of a market that is softening rather than undergoing a rapid shift. Overall, these insights validate our

forecast model, indicating that while the sales market continues to evolve, the changes are measured and reflective of a balanced environment with only slight enhancements in buyer engagement as we move into January 2025.

Insights

- *Market Trends and Dynamics:* The current sales landscape for January 2025 continues to reflect a predominantly buyer-favoured market, with most districts maintaining a “Buyer's” rating. Our forecast model from the 2024 yearly report had anticipated a slight softening in the market following a modest cooling in December 2024, and the data confirms that expectation with only marginal improvements in transaction volumes and overall market activity. While property values vary significantly—from more moderately priced areas to high-end districts—the overall trend shows consistent inventory levels and steady turnover percentages, indicating that buyers continue to wield significant negotiating power in this environment.
- *Market Fluctuations and Variability:* Despite the overarching buyer’s market, there is notable variability across different districts. Some areas exhibit a pronounced disparity between mean and median prices, suggesting the influence of high-end listings that elevate average figures, while others display a tighter pricing range indicative of a more uniform market. Inventory levels and on-market days also differ considerably, with certain districts holding nearly a full year’s supply and extended sale durations, contrasted by zones where properties move somewhat faster. These fluctuations underscore the importance of local nuances—each district’s unique mix of pricing, inventory, and transaction speeds creates pockets of variability even within a generally stable market.

- Market Possibilities and Opportunities: For stakeholders, the current market conditions offer a range of possibilities. Buyers are presented with opportunities to secure properties at competitive values, particularly in districts where the market dynamics suggest room for negotiation. Meanwhile, sellers in high-end segments may find that a broader gap between mean and median prices provides leverage to attract discerning buyers, even as properties take slightly longer to sell. The steady turnover and consistent inventory levels signal that, although the market is softening only marginally as forecasted, there remains ample scope for strategic positioning—whether one is aiming to capitalise on buyer strength or to adjust marketing tactics in anticipation of evolving local trends.