



# Quarterly Market Update

Q3 | 2025

# South Coast - Central

Stretching along the coast from Portsmouth to Southampton and up the M3 corridor all the way to Winchester and Farnham.



**“Uncertainty fuels hesitation. As conditions stabilise and market fundamentals continue to show resilience, we anticipate a return to a confident market fuelled by informed decision making and renewed optimism.”**

**Elliot Trodd**  
Managing Director

## LETTINGS

Healthy demand should drive confidence amongst uncertain landlords.

### Activity

New lets agreed

**▼ -22%**

**Q3 2025**

690 vs 884 Q3 2024

### Demand

Tenants

**▲ 23%**

**Q3 2025**

4,288 vs 3,474 Q3 2024

## SALES

Anticipation of the Budget impacting activity levels as the prime market slows.

### Supply

New instructions

**▲ 16%**

**Q3 2025**

848 vs 724 Q3 2024

### Activity

Sales agreed

**▲ 58%**

**Q3 2025**

780 vs 429 Q3 2024

## Navigating change with confidence

### Resilience through uncertainty

Despite economic uncertainty and media speculation, Q3 in South Coast Central defied expectations. Tenant demand didn't just hold steady - it grew. Registered lettings applicants rose by 23% year-on-year, underscoring the market's resilience even as landlord sentiment begins to shift.

Periodic tenancies are on the horizon, and many landlords are understandably concerned about long-term stability. Our experience denotes that tenants value consistency just as much as landlords, and Scotland's existing standard tenancy type is periodic, offering reassurance to the nervous market south of the border. Our partners at DJ Alexander report an average tenancy length of 28 months, proving that flexibility does not constitute instability.

### Practical protection for landlords

In a climate of uncertainty, Rent & Legal Protection (RLP) continues to gain traction. RLP offers landlords

peace of mind – covering lost rental income and up to £100,000 in legal costs. With 75% of new instructions opting in last month, it's clear that landlords are prioritising protection.

Tenant priorities are evolving. Around 30% of applicants are now asking about the Renters' Rights Act, showing growing awareness. Their focus is clear; modern, well-located properties, parking and ease of access, commutability and proximity to universities and value for money. Older stock is seeing reduced interest, while city centre flats and commuter town properties are in demand. The relocation market is also active, particularly among families. As tenants become more discerning, landlords who adapt to these shifting preferences will be better positioned to secure long-term, reliable occupancy.

### Sales with strategy

Sales activity continues to be driven by life stage motivations such as births, job changes, relocations and bereavements. Sellers are achieving positive results and buyers remain active, though cautious. The lower end of the market remains robust, while the

prime market is slower and correctly priced properties are selling. Our advice to sellers remains simple: present the property well, choose the right agent and price accurately, and the buyers will come. The £300,000–£750,000 range continues to be active, supported by regional mobility. Commuter towns remain particularly strong for London buyers, with areas such as Winchester, Southampton and the Waterside continuing to attract significant demand.

### Shaping the future

As we move into Q4, serious tenants and motivated buyers will continue to shape the market. With more choice and higher expectations, landlords and sellers must stay proactive. Presentation, pricing, and positioning are no longer optional – they're essential.

Looking ahead to 2026, clarity and confidence will likely define the market. As economic indicators stabilise and policy direction becomes clearer, we expect to see a release of pent-up demand. Those who act early, diversify wisely and lean into expert guidance will be well-positioned to capitalise on emerging opportunities.



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