

Housing Market Bulletin

for Cambridgeshire
Peterborough and West
Suffolk

Edition 66

Published October 2025, based on
June 2025 Hometrack data

Welcome

Welcome to Edition 66 of our longstanding housing market bulletin.

It seems 2025 is the year of change for the Bulletin, with a new look for Hometrack, our chief data source. We converted from Publisher to Word format in Ed 65, which was a big change! Now June 2025 data used in this edition comes using Hometrack's new data format. Changes include:

- Forest Heath and St Edmundsbury no longer appear, instead we have West Suffolk data at last!
- Weekly costs, particularly rents, are now presented as monthly costs; so instead of sticking with weekly values, from now on the Bulletin will provide monthly housing cost and rent figures instead, including Local Housing Allowance (LHA) rates.
- Data is available on more detailed property types, so rather than simple 1 2 3 4 beds, we can now look at 1 bed flat, 2 bed flat, 2 bed house, 3 bed house and 4+ bed house. We hope this adds to the insights!
- Map formats are being developed by Hometrack, at present we can only get district-wide sales prices and district-wide rents. We hope more maps will be available for Ed 67, in December.
- We can now mostly look back to 2016, so in this edition are presenting data over the last 12 months and 9 years. We'd welcome your feedback on whether one, the other, or both are most helpful!
- New combinations of data are possible, which may take some time to get the hang of, but should help us understand and track changes in our local housing markets. For this edition we can only provide data for our districts and the region. We hope England values will soon become available.

As always, you can look back at old editions by following this link, if you want to compare "old" and "new". All feedback is appreciated, as always. Thanks!

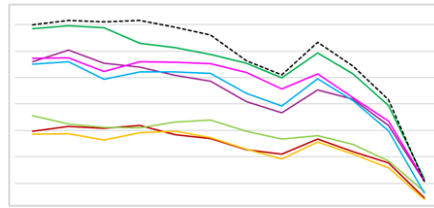
Sue Beecroft Housing Coordinator

In brief...

Hometrack summary Aug 2025

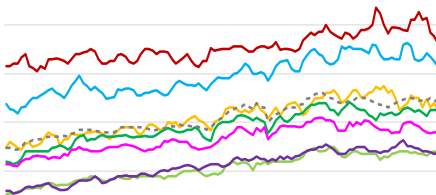
- Annual UK house price inflation is stabilising at 1.3%
- Demand (+4%) and sales agreed (+5%) are higher than last year
- Stronger buyers' market southern England is keeping price inflation in check while price inflation is higher in northern England. Homes are selling fastest in northern England (27 days) but taking longer to sell across southern England (39 days)
- Property tax speculation in the media could make some buyers and sellers pause ahead of the Autumn Budget.

Number of "real" sales



- The number of "real" sales (excludes valuations data) fell to June 2025, reflecting the regional trend.

Median price based on real sales



- Looking back to 2016, median prices based on real sales gradually creeping upwards, as well as seeing quite a few rises and falls along the way

Market temperature

- At June 2025 the time taken to sell was slowest in East Cambs and Fenland. As usual Cambridge sales went through the quickest.
- The percentage of asking price achieved was highest in Cambridge followed closely by West Suffolk, and lowest in East Cambs and Fenland.

Private rents and LHAs

- Rent data has had a quite serious make-over in this Edition, and median rents are now presented monthly (rather than weekly), and for a greater range of home types than our previous 1 2 3 and 4 beds. Compared to LHA rates (frozen for 2025/26) we see many failing to cover many private rents across the area. East Cambs is the district where more rents are covered by LHA.

Affordability ratios

- Not updated in this Edition, will return in Edition 67.

Ladders

- In this edition, the ladders are presented as monthly housing costs, for a wider range of property types as mentioned.
- Unfortunately although it will be available, Edition 66 does not include the monthly cost of new build homes. This will return!
- As with all the other Bulletin data, all averages are replaced with medians.

Back page

- The back page as usual sets out some background maps for the area covered, and contact details should you have suggestions of feedback, which are especially welcome as we navigate this "year of change" for the Bulletin.
- In the new format we've added a list of all the tables and figures on page 21.
- In addition, all figures, tables and page cross references throughout should now be "clickable" so you can find what's being referred to quickly. You may need to hold "ctrl" on the keyboard and click.
- An article on page 4 sets out the differences between averages and median, and why medians are possibly a better measure for housing market information.
- As always, we really welcome and look forward to your feedback on the changes in this Bulletin! Contact info is on the back page.
- We have added a page of links to all the figures, and a metadata (source info) table on page 21

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Hometrack UK price index, Aug 2025

+1.3%

UK house price inflation (July 2025)

+5%

Increase in sales agreed vs last year

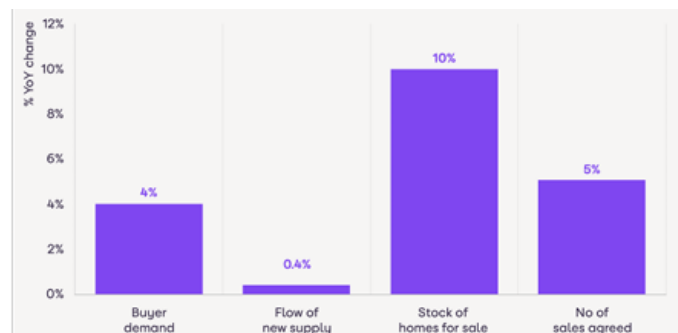
2.4x

Extra time it takes to sell a home where the asking price is reduced

Summary

- Annual UK house price inflation is stabilising at 1.3%
- Demand (+4%) and sales agreed (+5%) are higher than last year
- Stronger buyers' market southern England is keeping price inflation in check while price inflation higher in northern England
- Homes are selling fastest in northern England (27 days) but taking longer to sell across southern England (39 days)
- It takes 2.4x longer to sell a home if the asking price is cut
- Sellers need to discuss sales strategies and pricing ahead of the autumn selling season that starts in September
- Property tax speculation in the media could make some buyers and sellers pause ahead of the Autumn Budget.

Figure 1 Buyer demand and sales agreed moderate over peak summer months



"Housing market activity continues to grow alongside modest price inflation. Sellers looking to sell before the year end need to talk to their agent about the best strategy to achieve a sale"

Richard Donnell, Executive Director - Research

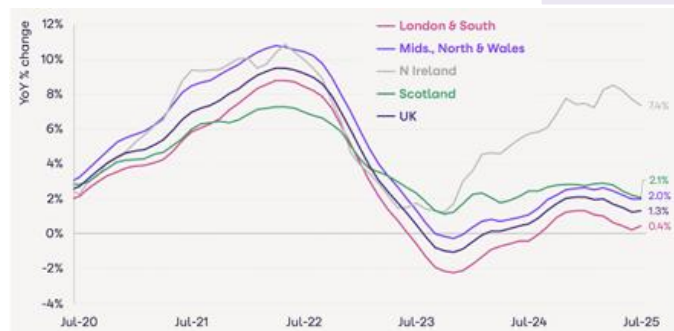
House price inflation stabilising at 1.3%

- The lead indicators of housing market activity are all higher than a year ago. Buyer demand has cooled over the summer but remains 4% higher¹ than a year ago. This is supporting continued growth in the number sales agreed which are 5% higher¹.
- The pace of house price growth has slowed over recent months, but the slowdown has bottomed out. Average UK house prices are +1.3% higher over the last year. This is below the +2.1% price inflation recorded at the start of 2025, but higher than +0.6% a year ago.
- Slower price inflation is down to a greater choice of homes for sale (10% more than last year) while affordability continues to be a constraint on buying power, especially across southern England.
- The current rate of price growth is low by long-run

standards. House prices continue to rise more slowly than earnings (4.7%), a trend that has been running for almost 3 years.

- This is positive and steadily helping to repair housing affordability, supporting demand and sales.

Figure 2 House price inflation starting to level out



Region and country level variation

- House price inflation is highest in Northern Ireland (+7.4%), with prices +2.1% higher in Scotland and average growth of +2% across northern regions of England. Lower house prices in these areas improves affordability for buyers, while increased sales volume have reduced the number of homes for sale. There are fewer homes for sale than a year ago in Scotland (-1%) and northern England (-4%). Fewer homes for sale encourages competitive bids, supporting house price growth.
- Southern regions of England continue to register the lowest annual price increases, averaging just +0.4%. The number of homes for sale in these regions is higher than a year ago, +18% in London and +12% across the South East and South West regions. Greater choice for buyers and higher prices are keeping house price inflation in check.

Time to agree a sale links to house price inflation

- The time on market² is another important barometer of housing market health and there is a clear link to house price inflation.
- In northern regions, fewer homes for sale and better affordability mean it takes fewer days to agree a sale. The average time on market for homes selling in July was 27 days in the North West and North East of England. This is 23% quicker than the 35-day national average.³
- In southern England, more homes for sale and higher prices are reinforcing a stronger buyers' market with an average time on market of 39 days for homes selling in July. This is 11% above average and generating less impetus for house price inflation.

2.4x

Extra time to sell a home if you cut the asking price to attract more interest

Homes with wrong asking price take twice as long to sell

- The time on market measure tells us about the time it takes from a home being first listed to a sale being agreed, subject to contract. It takes another 4-6 months to complete on a sale and for the buyer to move in once the legal process has run its course.

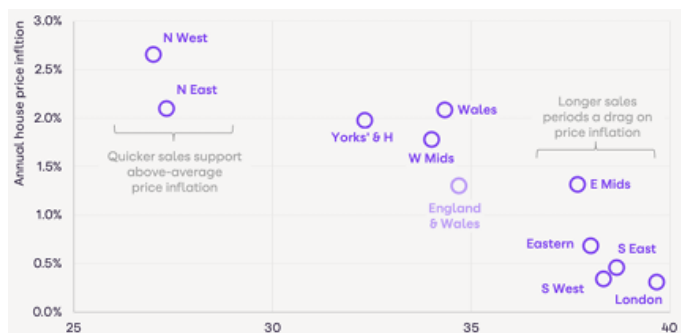
¹ Comparing 4 weeks to 17 August 2025 with the same period in 2024

² The time to sell or time on market is the time from first listing for sale to a sale agreed or 'sold subject to contract'. It can take a further 4-6 months to Cambridgeshire | Peterborough | West Suffolk

move to a completed sale where the buyer can move in.

³ England and Wales only – Scotland has a different system for marketing and selling homes with more upfront information

Figure 3 Clear relationship between time to sell and house price inflation



- Homes that are well priced are attracting bids and selling in a timely manner albeit with some regional variations. 2 in 5 homes for sale in the first half of 2025 went on to sell. Three quarters of these homes did not require any price reduction to attract more buyer interest.
- How much interest a home attracts depends upon local market conditions, how the property is presented, its overall condition and the price it is marketed at. Where the asking price is too high and needs to be cut to attract more interest, this impacts the time on market.
- Setting the wrong price can mean it will take more than twice as long to find a buyer and sell your home. Homes that need a price reduction take 2.4x longer to find a buyer than homes that are correctly priced. This is an important consideration given the growth in homes for sale.

Areas where sellers need to be cautious

- Market conditions have softened since the end of the stamp duty holiday in March and this has led to a steady increase in the proportion of homes for sale with asking price reductions. In July, 1 in 10 homes for sale registered a cut to the asking price, well above a 6% average over the last 5 years. This highlights the need to accurately price homes for sale and speak to an agent with expertise in the local market. It also explains why house price inflation has slowed recently.
- September is the start of the autumn selling season when sellers who haven't yet sold their home will speak to their estate agent about the strategy to find a buyer. One such strategy is adjusting the price lower or boosting the visibility of a property listing to a wider pool of buyers.

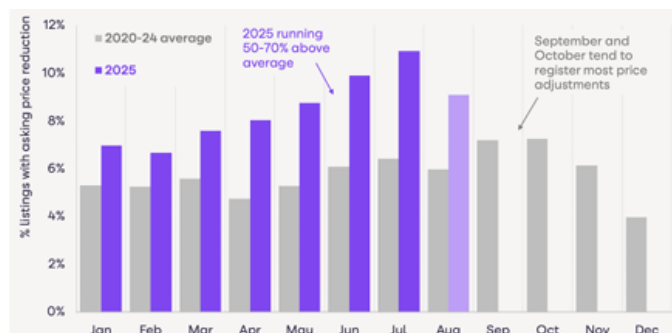
10%

Proportion of homes with an asking price cut to attract more interest in July 2025

Markets with the most unsold homes

- More homes for sale is factor behind longer sales times and lower price inflation. Coastal areas across southern England have the most unsold homes for sale meaning greater competition amongst sellers. In Truro, Exeter and Bournemouth more than a quarter of homes for sale have been on the market for more than 6 months, more than a third higher than average for this time of year. Greater choice and competition is also impacting prices which are between 1.1% and -1.4% lower in these markets than a year ago.
- Other areas with an above-average stock of unsold homes include York, Torquay and Llandrindod Wells in Wales. These are markets where sellers need to be realistic on price if they want to sell this year.
- In contrast, there are markets with a lack of supply including Dundee, Wolverhampton, and outer suburbs of London and Northampton.
- Market conditions vary widely, and this shows the importance of sellers speaking to local agents to get the right advice for their home.

Figure 4 Buyer's market: more homes with cuts to asking prices to attract interest



Outlook

- There is plenty of demand for homes and more people are looking to move. However, buyers also have much greater choice to choose from, especially in local areas across southern England.
- Sellers need to understand local market conditions when considering how to market their home, setting the right price and how quickly they would like to sell. The risk of being too ambitious on price is your home taking more than twice as long to find a buyer - or not selling at all.
- We expect UK house price inflation to continue in a range of 1.5-2% over the rest of the year. While low, there are signs that prices are firming across southern England. The market continues to record seasonally strong sales and remains on track for 1.15m sales in 2025.
- Media speculation over possible changes to property taxes are unwelcome could see some buyers delay decisions in the short term until after the Budget. Media speculation often remains just speculation so buyers should be careful not to miss out.

£36bn

Tax relief on capital gains from sales of main residence (HM Treasury)

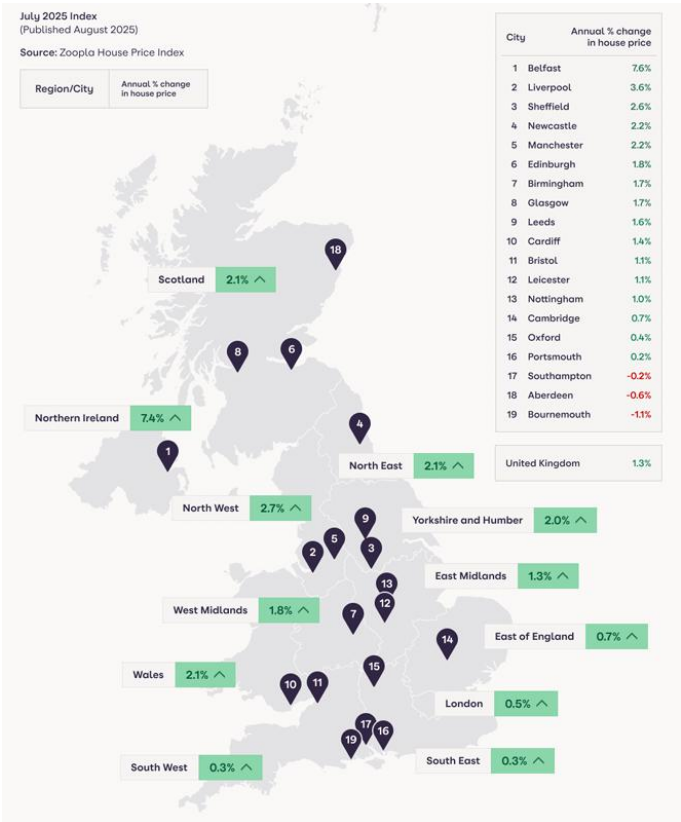
Tax speculation

- The media has been speculating over possible tax changes 'being considered by the Treasury' impacting the housing market. Ideas floated have included 1) the removal of stamp duty and replacement with an annual property tax for homes over £500,000 and 2) sellers of main residence's over £1.5m having to pay capital gains tax (CGT).
- This is usual pre-Budget speculation but with some extra bite from think tank policy proposals. Reform of property taxes to remove the barriers to moving and support economic growth have been long promoted. There would be universal approval over the abolition of stamp duty. However, it is tax that generates over £10bn a year.
- Removing stamp duty at a time when finances are tight seems a strange move when the alternative annual property tax would take c.10 years to replace the lost tax revenue. There are big transitional risks and uncertainties of how this might distort the market, while the political risks also appear high.
- Tax free gains on the sale of a main residence is a core part of home ownership in the UK. Second home-owners and investors already pay CGT on gains. It's a large tax relief for home-owners worth £36bn a year on HM Treasury estimates. The media speculation is focused on taxing gains on the 4% of homes for sale that are worth over £1.5m.
- This would be a big change and send a strong signal that would have much bigger implications for the upper end of the property market. The odds are that nothing changes but reducing the costs and barriers to moving home should remain a key Government priority.

Questions?

If you have any questions about our research please do get in touch Richard Donnell, Director of Research & Insight at richard.donnell@zoopla.co.uk and Theo Brewer, Director of Innovation at theo.brewer@hometrack.com

Figure 5 Zoopla housing price index, city summary, July 2025



Notes

The information and data in this report was correct at the time of publishing and high standards are employed to ensure its accuracy.

However, no reliance should be placed on the information contained in this report and Zoopla Ltd and its group companies make no representation or warranty of any kind regarding the content of this article and accept no responsibility or liability for any decisions made by the reader based on the information and/or data shown here.

Sources

Pages 2 to 4 are edited from <https://www.hometrack.com/newsroom/uk-house-price-index/>
<https://www.hometrack.com/wp-content/uploads/2025/08/UK-House-Price-Index-Aug-25.pdf>

You can sign up for all the latest research from Zoopla at <https://advantage.zpg.co.uk/>

Table 1. House Price Index - Country, region and city summary

	Average price	%YoY Jul-25	%YoY Jul-24
UK	£270,600	1.3%	0.6%
20 city composite	£310,700	1.2%	0.8%
Belfast	£192,200	7.6%	5.9%
Liverpool	£165,700	3.6%	1.9%
Sheffield	£176,400	2.6%	1.3%
Manchester	£234,000	2.2%	2.6%
Newcastle	£160,400	2.2%	1.8%
Edinburgh	£279,300	1.8%	1.0%
Birmingham	£214,000	1.7%	1.3%
Glasgow	£157,900	1.7%	3.5%
Leeds	£215,100	1.6%	1.6%
Cardiff	£257,800	1.4%	1.3%
Leicester	£229,700	1.1%	-0.2%
Bristol	£342,900	1.1%	0.7%
Nottingham	£205,400	1.0%	0.8%
Cambridge	£468,400	0.7%	0.3%
London	£536,300	0.5%	-0.1%
Oxford	£451,500	0.4%	0.3%
Portsmouth	£277,100	0.2%	-0.8%
Southampton	£258,800	-0.2%	0.7%
Aberdeen	£135,500	-0.6%	-2.6%
Bournemouth	£323,900	-1.1%	-0.2%

Note: The Zoopla house price index is a repeat sales-based price index, using sold prices, mortgage valuations and data for agreed sales. The index uses more input data than any other and is designed to accurately track the change in pricing for UK housing.

Article: average vs median

Because the new Hometrack data presentations use medians more than averages, this little article sets out some of the differences and advantage of moving to medians.

- **The median** of a set of numbers is that number where half of the numbers are lower, and half of the numbers are higher. In the case of real estate, that means the median is the price where half of the homes sold in any given area that month were cheaper, and half were more expensive.
- **The average** of a set of numbers is the total of those numbers divided by the number of items in that set. The median and the average might be close, but they could also be significantly different. It all depends on the numbers.
- The advantage of the median is that it removes extreme measurements from a data set, giving you a more realistic idea of what to expect. The average can give you a more accurate sense of the total scope of data, but when it comes to planning for expenses, the median is a more reliable guide.

	Average	Median
Definition	The sum of all values divided by the number of values	The middle value when all values are arranged in order
Impact of Outliers	Can be heavily influenced by outliers	Less affected by outliers
Calculation	Sum of all values divided by Number of values	Middle value of the sorted list
Usefulness	Useful for finding the central tendency of a dataset	Useful for finding the typical value in a dataset

Number of sales and valuations

What does this page show?

This page shows the number of sales and valuations, giving useful context to the rest of the Bulletin.

Sales data comes from the Land Registry which is combined with Hometrack data which adds valuations data from the top 20 mortgage providers across the country. The data is presented monthly over the past year (previously was presented in six month "chunks").

Figure 6 shows the number of sales and valuations for the East of England (dashed line) and the number of sales and valuations for each of the districts in our area over the past 12 months. Because there are many more sales across the region than across each district, the regional number is indicated against the right-hand axis on the graph (maximum count is 40,000 sales and valuations), while the district numbers are shown against the left-hand axis (maximum count of 1,400 sales and valuations). This way, we can compare the trends across the region and across the districts

Figure 7 shows the same data over the past 9 years, again using the left and right axes for district and regional values.

Would really welcome any feedback on which you would prefer, or would you like both to be presented in future?

Table 2 shows the number of sales and valuations for each district and the East of England over the past 12 months (July 2024 to June 2025). We are discussing with Hometrack whether the new data system can include an England total, for comparison purposes.

Notes & observations

- Figure 6 shows reasonably similar trends for the districts and the region since July 2024.
- There is also a similarity in the lines for districts and the region since 2016, looking at Figure 7. This is a new graph, we have never been able to look back as far using the old Hometrack data system, so it would be good to know if you find this useful!
- Table 2 shows lower totals than in past editions (we used to see between 1,000 and 3,000 totals for each district) –not because the number of sales has fallen, but because the old Hometrack format gave totals over the previous 6 months. In the new system, there is a simply a total number for each month.
- To help see any pattern over the past 12 months, we had included Figure 8 - sparklines representing the data in Table 2. To my eye this shows a fairly similar pattern of "ups and downs"; with the last 3 months showing lower values, as numbers are being processed before the sale or valuation is reported. The colour coding (used through the Bulletin) denotes which district each sparkline relates to.
- In past editions we have seen that the number of sales + valuations drops over the most recent 6 months, picking up once more sales have been reported via the Land Registry system. There is no reason looking at this Bulletin, so believe that pattern has changed.

Table 2. Number of sales + valuations

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	527	540	535	560	534	511	435	420	499	436	406	329
East Cambs	487	471	429	476	499	461	392	365	455	415	374	294
Fenland	591	541	536	551	576	568	500	477	508	482	456	394
Huntingdonshire	1,172	1,153	1,157	1,100	1,105	1,045	985	920	1,026	929	909	770
Peterborough	1,019	1,017	969	965	947	890	781	758	881	840	779	650
South Cambs	895	923	887	923	933	879	811	753	901	776	672	512
West Suffolk	933	926	870	934	940	894	838	777	890	799	806	697
East of England	33,451	33,447	33,773	34,368	33,785	31,789	28,530	27,166	31,832	28,719	26,866	21,693

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Hometrack HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Figure 6 Number of sales and valuations over past 12 months

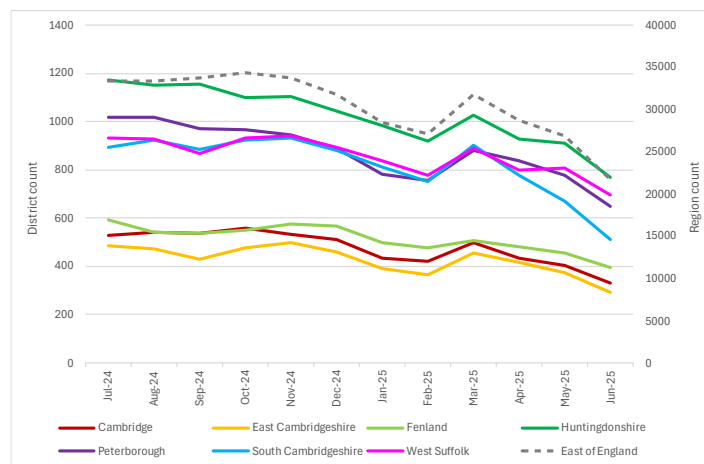


Figure 7 Number of sales and valuations over past 9 years

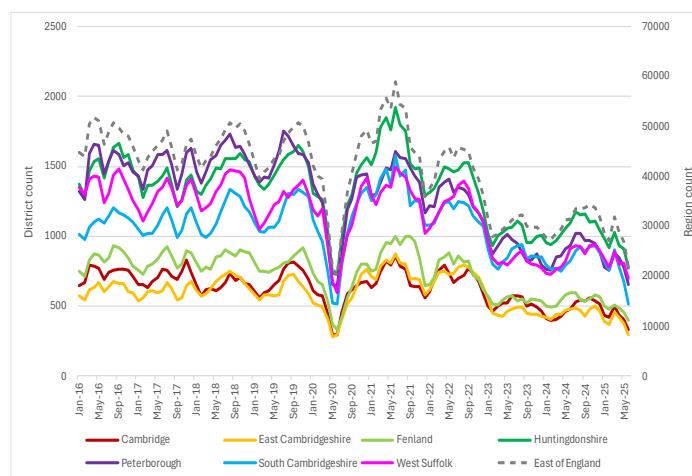


Figure 8 Sparklines



Median price based on sales + valuations

What does this page show?

Median prices on this page are based on sales and valuation data, providing a 'rolling' median price based on the previous three months data.

- Figure 9 shows median prices achieved for homes across our whole area at district level. We look forward to further developments at Hometrack HQ, which will lead to a return to ward level maps. Watch out for Edition 67!
- Figure 10 shows the median price trend for each district (solid lines) and the region (grey dots) over the past 12 months.
- Figure 11 shows the median price trend for each district (solid lines) and the region (grey dots) over the past 9 years.
- Table 3 shows median property prices every month over the past 12 months (July 2024 to June 2025).

Notes & observations

- Figure 9 continues to show, overall, a familiar pattern of prices; generally higher in the south of our area (Cambridge and South Cambs), mid prices across the middle (Huntingdonshire, East Cambs and West Suffolk), and lower in the north (Peterborough and Fenland).
- Figure 10 shows average prices are higher for Cambridge (red) and South Cambridgeshire (pale blue) than all other areas. Peterborough (purple) and Fenland (light green) see similar average prices at the lower end of the scale. East Cambs (orange), West Suffolk (pink) and Huntingdonshire (dark green) median prices were slightly lower than the East of England median (dashed).
- Figure 11 again shows a similar trend line across the districts and the region, over the past 9 years.
- Table 3 shows some small rises and falls in median price over the past 12 months.
- Comparing July 2024 and June 2025, six areas have seen a drop in median price and two areas have seen a rise; namely East Cambridgeshire and West Suffolk.

Note

Changing from average to median has an effect, please see Article: average vs median on page 4. The new data is more "rounded" than previously, which assists with seeing overall change but feels like a slightly less detailed view. Being able to see trends over the longer term is very helpful, providing a longer horizon for our comparisons and to see trends in the median price.

Figure 9 Median price, district level

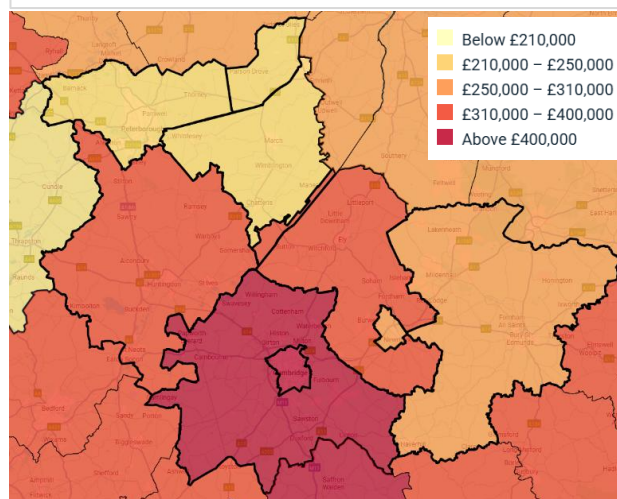


Figure 10 Median price based on sales + valuations over last 12 months

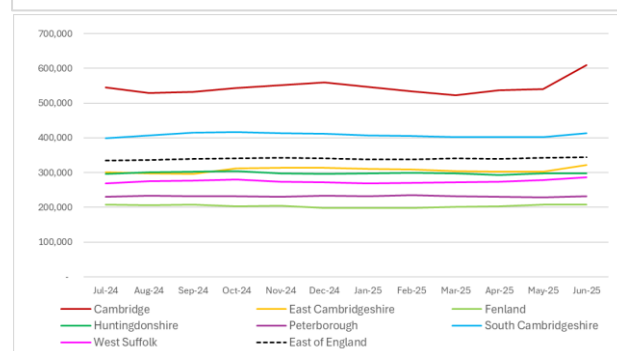


Figure 11 Median price based on sales + valuations over last 9 years

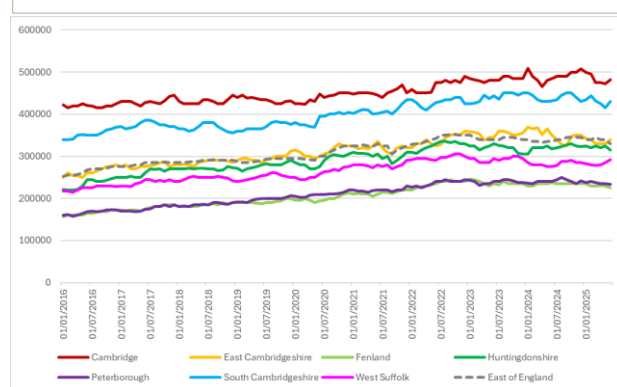


Table 3. Median price based on sales + valuations (£)

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	↑↓
Cambridge	489,000	490,000	490,000	500,000	500,000	510,000	500,005	500,000	475,000	475,000	474,004	480,000	↓
East Cambs	339,000	330,000	328,000	346,000	350,000	350,000	340,000	340,000	330,000	332,000	329,000	340,000	↑
Fenland	235,000	235,000	235,000	235,000	240,000	235,000	239,998	235,000	231,750	235,000	230,165	225,000	↓
HDC	320,000	325,000	330,000	330,000	325,000	325,000	325,000	320,000	325,000	324,000	325,000	315,000	↓
Peterborough	245,000	249,950	245,000	242,500	238,000	242,000	237,500	240,000	239,000	235,000	235,000	233,000	↓
South Cambs	435,000	446,352	450,000	450,000	435,000	430,000	436,500	450,000	435,000	428,875	415,000	425,500	↓
West Suffolk	278,000	287,750	290,000	293,250	285,000	285,000	284,475	280,000	280,000	280,000	285,000	290,000	↑
E of England	340,000	340,000	345,000	347,000	345,000	345,000	340,000	340,000	345,000	340,000	340,000	330,000	↓

About median sold & valuation price

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Hometrack HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Number of sales excluding valuations

What does this page show?

This page shows the number of sales completing using only data from the Land Registry. This page excludes the valuation data secured by Hometrack.

The number of “actual” sales is useful to understand turnover in our housing market excluding for example, valuations for re-mortgage purposes. Sales and valuation data is used elsewhere by Hometrack to secure a bigger sample size, so other statistics are provided with a reasonable levels of confidence.

- Figure 12 shows the total number of actual sales across the East of England and our group of districts. Please note the different scales on the left and right axes. The scale on the left shows the number of sales for districts (up to 1,600 sales) while the scale on the right shows the number of sales across the region (the grey dashed line) – going up to 45,000 sales.
- Table 4 sets out the number of “real” sales for each district and the region, over the past 12 months (July 2024 to June 2025).

Notes & observations

- Figure 12 shows a similar trend to that on page 5 (see inset graph) but possibly a little more “dramatic”. There is a drop in sales around Jan/Feb 2025, an increase to March, and since March the numbers fall away to a low point in June. As previously discussed, the drop will be partly due to the time to process sales numbers, and in the past we have seen the number of sales in the latest month increasing / stabilizing once the sales data has been processed.
- In Table 4 Huntingdonshire sees the largest number of actual sales completing at 358, closely followed by West Suffolk at 356. The smallest number of sales completed in Cambridge at 111 at June 2025. It's important to note that this is not a comment on demand or efficiency in either district—it's more the result of the number of homes in each area.
- In this edition we have included Figure 13 Sparklines which summarize the data in Table 4, to aid comparison and see whether similar trends are in play. To my eye, it looks like a fairly similar pattern across our districts and the region. This just uses a slightly simpler format for the same data presented in Figure 12.

Please note:

When comparing actual sales on this page to sales + valuations on the previous page, that valuation data includes re-mortgages and mortgage valuations for homes that never make it to sale. Just highlighting, it's not “like-for-like”.

About the new data:

The numbers are lower in this edition than the last.

This is because the previous table set out totals every 6 months, where this table is (perhaps more straightforwardly) giving a total number of sales in one month.

Table 4. Number of actual sales

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25
Cambridge	307	330	323	337	297	286	243	237	292	242	204	118	111
East Cambs	304	318	292	318	319	294	250	220	291	240	206	126	132
Fenland	375	352	340	346	360	385	343	316	314	274	251	197	187
Huntingdonshire	724	751	757	695	678	654	630	574	657	562	521	376	358
Peterborough	584	639	599	604	561	532	450	425	512	469	436	326	298
South Cambs	589	622	557	574	563	553	500	462	580	477	383	226	236
West Suffolk	599	621	586	617	600	594	565	515	573	470	460	348	356
East of England	20,787	21,832	21,956	22,024	20,845	20,039	17,744	16,760	20,252	17,146	15,034	9,678	9,911

About number of sales (sold only, excludes valuations)

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Figure 12 Number of sales excluding valuations, districts & region

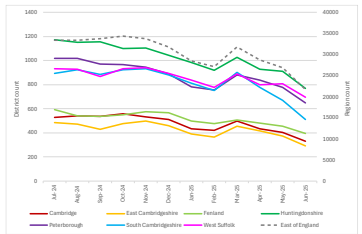
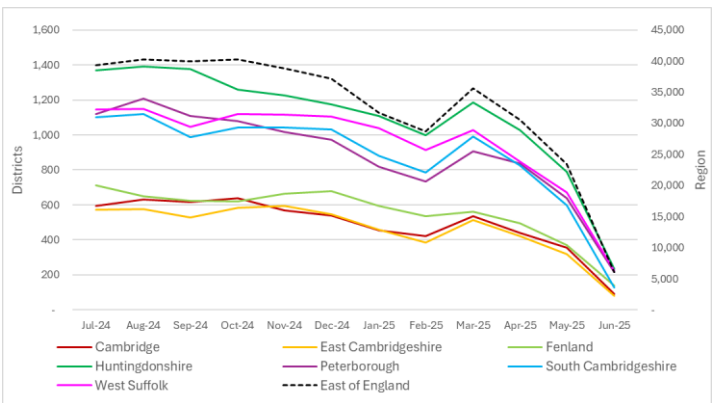
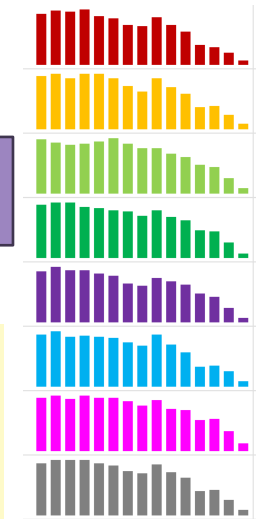


Figure 13 Sparklines



Do you like the sparklines?
Do they help you see the similarities and differences?
We'd love to hear your thoughts!

Median price of real sales

What does this page show?

This page shows the median price reached for “real” sales only i.e. excluding valuation data. The data comes from Land Registry, which can be slow to come through.

- Figure 14 shows the trend in median price of actual sales for each district (solid lines) and for the East of England region (grey dots) over the past 12 months.
- Figure 15 sets out the same data, looking back over the past 9 years.
- Table 5 shows median property prices based on actual sales only from July 2024 to June 2025.

Notes & observations

- The median price based on sales only looks reasonably steady for each district, and across the region, looking at Figure 14. There is a rise to around December 2024, then a drop leading to the latest data in June 2025. Some districts vary a little from this general pattern; East Cambs and West Suffolk look to be rising a little between May and June 2025. This is supported by the figures in Table 5.
- Figure 15 summarizes a lot of variation over the last 9 years, as might be expected, with median prices based on real sales gradually creeping upwards, as well as seeing quite a few rises and falls along the way.
- Table 5 shows the lowest median price based on sales only was £219,000 in Fenland, and the highest was £452,500 in Cambridge.
- Using Table 5 to compare July 2024 and June 2025, six areas have seen a drop in median price based on sales only, and two have seen a rise, namely East Cambridgeshire and West Suffolk (reflecting the same direction of change as for median price based on sales and valuations).
- On the next page, the prices based on sale + valuations, and the prices based on sales only, are compared to test how different the prices are when using the different data sets.

Figure 14 Median price based on ‘real’ sales only, past 12 months

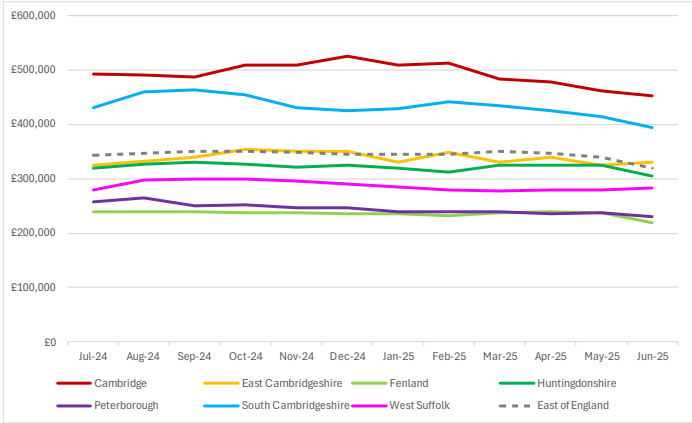


Figure 15 Median price of actual sales, past 9 years

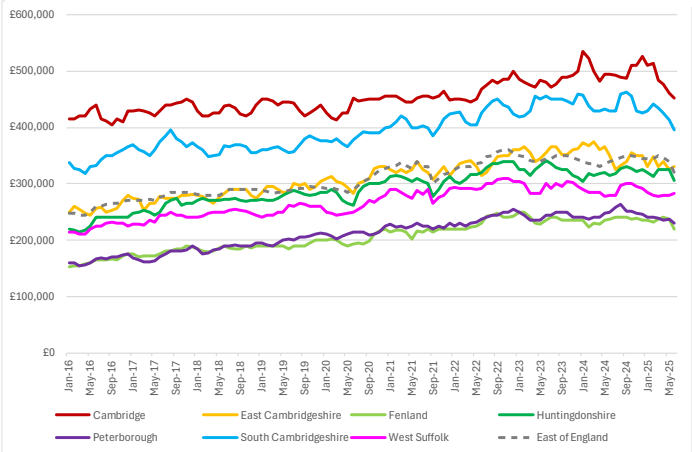


Table 5. Median price based on sales only (£)

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	↕
Cambridge	493,123	490,000	487,000	510,000	510,000	526,250	510,000	513,500	483,100	477,500	461,500	452,500	↓
East Cambs	325,000	331,500	340,000	355,000	350,000	350,000	331,000	348,500	330,000	338,750	325,000	330,000	↑
Fenland	240,000	240,000	240,000	237,250	238,213	235,000	236,000	231,375	236,500	240,000	237,500	219,000	↓
Huntingdonshire	318,625	327,000	330,000	327,000	322,000	325,000	320,000	312,750	325,000	325,750	325,000	305,500	↓
Peterborough	258,000	264,000	251,000	252,000	247,000	246,450	240,000	240,000	239,500	235,000	237,000	230,000	↓
South Cambs	430,000	460,000	463,000	455,000	430,000	425,000	428,750	441,498	433,750	425,000	414,000	395,000	↓
West Suffolk	280,000	297,500	300,000	300,000	295,000	291,000	284,000	280,000	278,000	280,000	280,000	282,250	↑
E of England	342,500	347,000	350,000	350,000	348,000	345,000	345,000	345,000	350,000	346,000	340,000	320,000	↓

About number of sales (sold price only, excluding valuations)

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Median price of real sales compared to price based on sales + valuations

What does this page show?

On this page, for the first time, we separate out the comparison of two data sets, to give them some more time and attention. We compare the data presented on pages 6 and 8 and have repeated the graph used in previous Bulletins to compare the median price based on sales, to the median price based on sales + valuations. This helps us see whether using sales + valuations, or sales only data, provide us with a similar, or a different, view of the median prices for each area.

Figure 16 sets out the median price based on sales only (dashed lines) and the median price based on sales + valuations (solid lines), over the past 12 months.

Figure 17 repeats the same approach, looking at data for the past 9 years.

Notes & observations

- Figure 16 shows varying trends for each area. The solid and dashed lines for each area seem to follow each other fairly consistently overall, sometimes slightly above, sometimes slightly below.
- It appears that for all areas, the “real sales” median price is a little lower than the “sales + valuation” price when looking at the most recent month of data (June 2025)
- Figure 17 shows the same data set, but over the past 9 years. This, in my mind, highlights how closely the two lines run for each area covered. There are some differences, but in general, the lines run fairly close, so using median price based on sales + valuations, or median price based on real sales only, does not have a big effect. However it is good to be aware of the differences and to keep an eye on whether the two lines diverge very much over time. Ehen looking at median price by property type, or at ‘smaller than district’ levels of detail, the larger sample size provided by using sales + valuations will help maintain our confidence that the data is robust enough to rely on.

Table 6. Comparing median price, using sales vs sales + valuations

	Jun-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25	Dec-24	Nov-24	Oct-24	Sep-24	Aug-24	Jul-24
Cambridge												
Sales	£452,500	£461,500	£477,500	£483,100	£513,500	£510,000	£526,250	£510,000	£510,000	£487,000	£490,000	£493,123
S+V	£480,000	£474,004	£475,000	£475,000	£500,000	£500,005	£510,000	£500,000	£500,000	£490,000	£490,000	£489,000
East Cambridgeshire												
Sales	£330,000	£325,000	£338,750	£330,000	£348,500	£331,000	£350,000	£350,000	£355,000	£340,000	£331,500	£325,000
S+V	£340,000	£329,000	£332,000	£330,000	£340,000	£340,000	£350,000	£350,000	£346,000	£328,000	£330,000	£339,000
Fenland												
Sales	£219,000	£237,500	£240,000	£236,500	£231,375	£236,000	£235,000	£238,213	£237,250	£240,000	£240,000	£240,000
S+V	£225,000	£230,165	£235,000	£231,750	£235,000	£239,998	£235,000	£240,000	£235,000	£235,000	£235,000	£235,000
Huntingdonshire												
Sales	£305,500	£325,000	£325,750	£325,000	£312,750	£320,000	£325,000	£322,000	£327,000	£330,000	£327,000	£318,625
S+V	£315,000	£325,000	£324,000	£325,000	£320,000	£325,000	£325,000	£325,000	£330,000	£330,000	£325,000	£320,000
Peterborough												
Sales	£230,000	£237,000	£235,000	£239,500	£240,000	£240,000	£246,450	£247,000	£252,000	£251,000	£264,000	£258,000
S+V	£233,000	£235,000	£235,000	£239,000	£240,000	£237,500	£242,000	£238,000	£242,500	£245,000	£249,950	£245,000
South Cambridgeshire												
Sales	£395,000	£414,000	£425,000	£433,750	£441,498	£428,750	£425,000	£430,000	£455,000	£463,000	£460,000	£430,000
S+V	£425,500	£415,000	£428,875	£435,000	£450,000	£436,500	£430,000	£435,000	£450,000	£450,000	£446,352	£435,000
West Suffolk												
Sales	£282,250	£280,000	£280,000	£278,000	£280,000	£284,000	£291,000	£295,000	£300,000	£300,000	£297,500	£280,000
S+V	£290,000	£285,000	£280,000	£280,000	£280,000	£284,475	£285,000	£285,000	£293,250	£290,000	£287,750	£278,000
East of England												
Sales	£320,000	£340,000	£346,000	£350,000	£345,000	£345,000	£345,000	£348,000	£350,000	£350,000	£347,000	£342,500
S+V	£330,000	£340,000	£340,000	£345,000	£340,000	£340,000	£345,000	£345,000	£347,000	£345,000	£340,000	£340,000

Data sources for Table 6 are set out on pages 6 and 8.

Figure 16 Median price comparing actual sales to sales + valuations, last 12 months

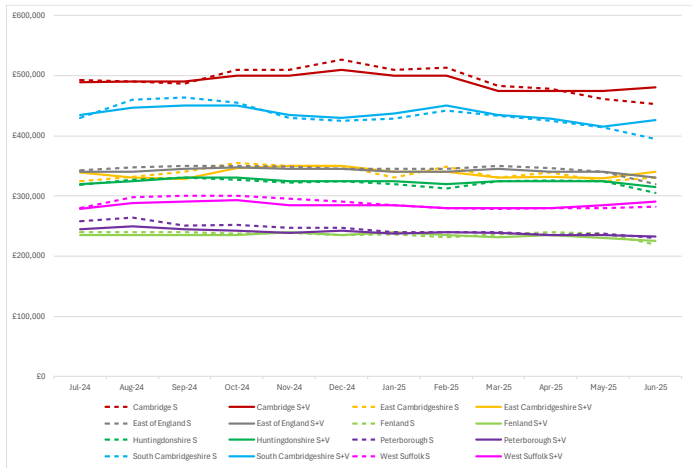
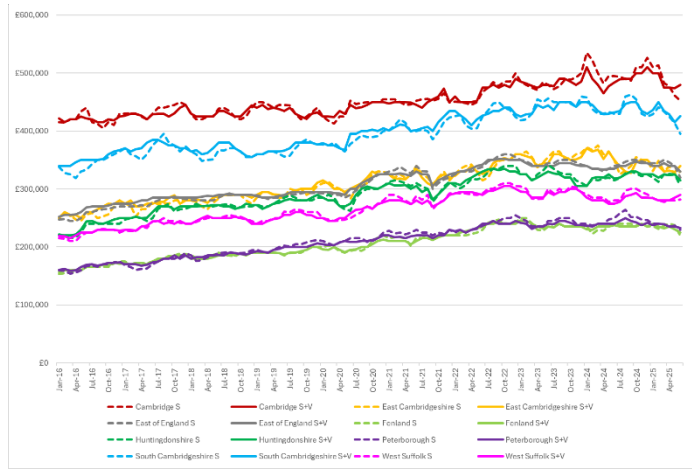


Figure 17 Median price based on sales and on sales + valuations, last 9 years



Lower Quartile price

What does this page show?

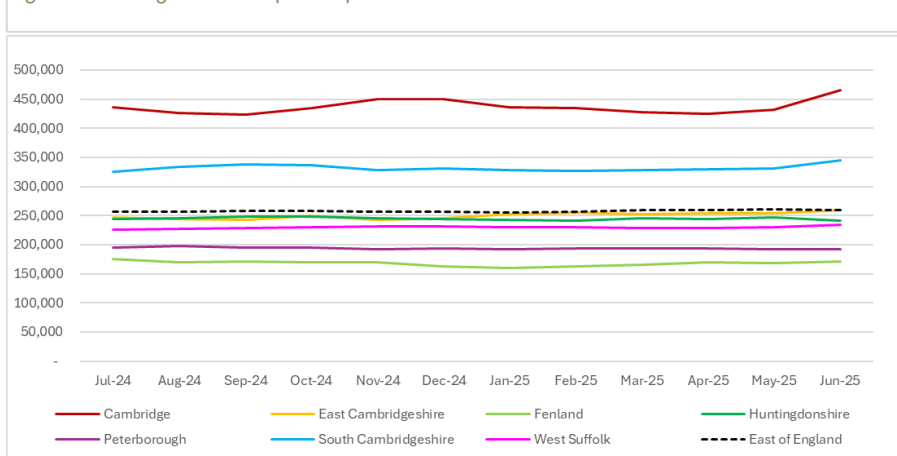
This page sets out lower quartile prices, which reflect the cheapest 25% of the market.

Lower quartiles can be used as a guide to “entry level” sales prices. The data is based on a combination of sales and valuation data.

When the lower quartile price decreases it means the lowest “end” of the market is becoming more affordable. Where it increases, the market is becoming less affordable.

- Figure 18 shows lower quartile prices for each district (solid lines) and the East of England region (grey dashes).
- Table 7 shows lower quartile prices every month over the past 12 months (July 2024 to June 2025).

Figure 18 Change in lower quartile price



Notes & observations

- Figure 18 Change in lower quartile price shows a fairly similar pattern, and steady lines overall, across our districts and the region.
- Table 7 shows that in June 2025, lower quartile prices ranged from £170,650 in Fenland to £465,350 in Cambridge.
- Comparing June 2025 to July 2024, lower quartile prices have increased in five areas (meaning the bottom end of the market is becoming less affordable) and decreased in three areas (the bottom end of the market is becoming more affordable). The decreases were seen in Fenland, Huntingdonshire and Peterborough.

Note: Why look at lower quartiles?

Let's say 200 homes were sold in a month and we make a list of the prices of all 200 homes, putting them in order from cheapest to most expensive. The first 50 homes on the list are called the lower quartile. The price of the home 50th from the bottom of the list is the “lower quartile” price. So, the lower quartile price indicates that the cheapest quarter of homes sold for less than this price.

Table 7. Lower quartile price based on sales + valuations (£)

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	↑↓
Cambridge	436,500	426,378	423,601	434,550	450,500	449,783	436,550	435,299	427,324	425,163	431,544	465,350	↑
East Cambs	246,425	243,530	242,650	249,282	243,221	245,050	252,500	255,600	252,750	253,450	254,200	258,850	↑
Fenland	175,013	169,850	171,600	169,600	169,050	163,250	159,700	162,590	165,550	169,275	168,750	170,650	↓
HDC	244,350	245,250	248,300	248,375	245,850	244,350	242,425	240,600	245,325	244,400	246,675	241,600	↓
Peterborough	195,600	198,000	195,100	195,200	191,850	193,175	192,600	193,450	193,800	194,000	192,825	192,250	↓
South Cambs	325,200	333,895	338,295	337,250	328,338	330,350	327,750	326,760	327,791	329,875	331,250	344,375	↑
West Suffolk	225,389	227,650	228,600	230,700	230,975	231,200	230,500	230,500	228,500	229,200	230,550	233,850	↑
East of England	256,000	256,610	257,800	258,025	257,000	256,025	255,000	256,000	259,000	259,000	260,200	259,875	↑

About lower quartile sold & valuation price

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Hometrack HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Price per m2

What does this page show?

Price per square metre is a measure used in housing development calculations.

- Figure 19 shows the change in median price per square metre across the districts (solid lines) and the region (grey dashes) over the past 12 months.
- Figure 20 shows the same data over the past 9 years (June 2016 to June 2025)
- Table 8 shows price per square metre values for each month, from July 2024 to June 2025

Notes & observations

- Figure 19 shows trendlines for all areas, which look fairly level over the past 12 months.
- Figure 20, set over the past 9 years, shows a much longer term trend in prices per m², all creeping upwards overall, with each district's line fairly closely following the East of England line.
- Table 8 shows the values for each district, ranging from £2,262 in Fenland to £5,122 in Cambridge.
- Comparing July 2024 and Jun 2025, average prices per sq m increased in 3 districts and the region, and decreased in 4 districts – however many of the changes are relatively small. The sample size is set out in Table 9.

Note: About price per square metre

Price per square metre is used to help compare prices "per unit of floor area".

It gives an idea of price regardless of the number of bedrooms a home has, so it helps compare values on a like-for-like basis.

Figure 19 Median sold & valuation price per square metre, last 12 months

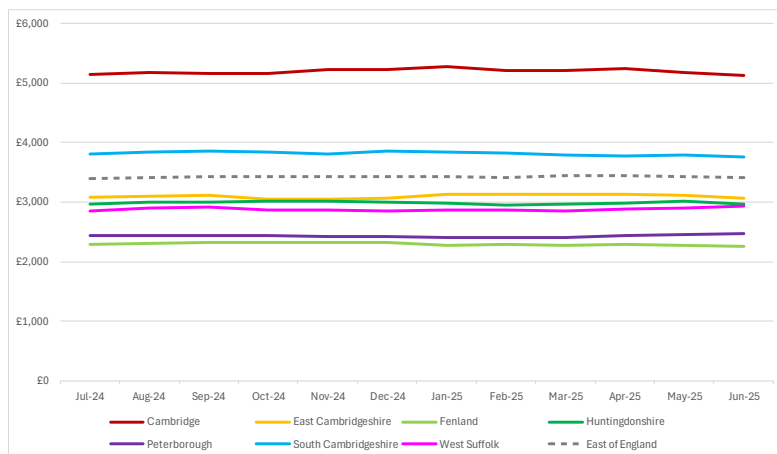


Figure 20 Median sold & valuation price per square metre, last 9 years

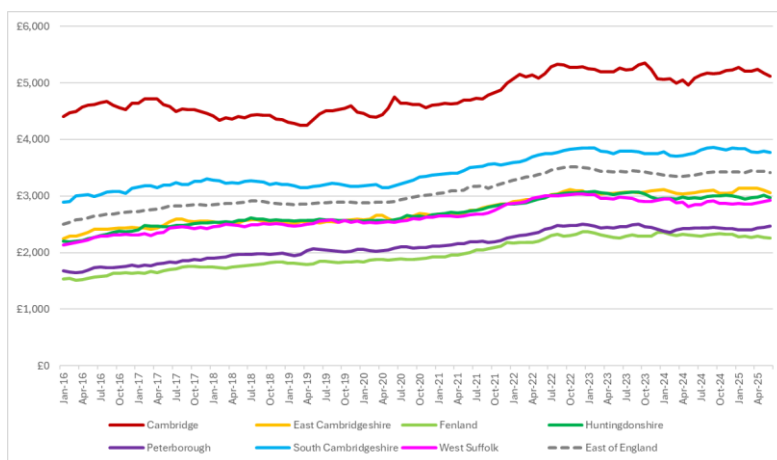


Table 8. Median sold and valuation price per sq metre (£)

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	Ma-25	Jun-25	↑↓
Cambridge	£5,141	£5,177	£5,166	£5,169	£5,221	£5,233	£5,272	£5,208	£5,208	£5,237	£5,172	£5,122	↓
East Cambs	£3,081	£3,091	£3,107	£3,044	£3,044	£3,057	£3,131	£3,135	£3,132	£3,132	£3,106	£3,058	↓
Fenland	£2,285	£2,309	£2,320	£2,330	£2,325	£2,320	£2,280	£2,290	£2,268	£2,289	£2,271	£2,262	↓
HDC	£2,958	£2,991	£3,000	£3,007	£3,015	£3,000	£2,985	£2,948	£2,972	£2,976	£3,009	£2,970	↑
Peterborough	£2,432	£2,439	£2,443	£2,439	£2,427	£2,423	£2,402	£2,402	£2,399	£2,434	£2,448	£2,470	↑
South Cambs	£3,813	£3,846	£3,860	£3,837	£3,812	£3,849	£3,836	£3,832	£3,786	£3,771	£3,789	£3,766	↓
West Suffolk	£2,847	£2,905	£2,911	£2,871	£2,869	£2,857	£2,869	£2,859	£2,857	£2,881	£2,897	£2,927	↑
EoEngland	£3,391	£3,409	£3,423	£3,429	£3,429	£3,421	£3,421	£3,416	£3,448	£3,439	£3,433	£3,409	↑

Table 9. Count of sample used for median sold and valuation price per square metre

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	501	514	512	525	507	487	420	401	481	424	398	319
East Cambs	441	433	406	451	462	419	356	338	429	387	345	265
Fenland	536	504	510	523	545	527	466	442	481	453	432	379
HDC	1110	1089	1091	1034	1048	993	946	872	971	874	855	724
Peterborough	967	970	931	919	899	841	737	721	847	817	761	635
South Cambs	831	860	825	870	886	842	771	711	862	741	646	485
West Suffolk	869	871	818	884	889	846	787	733	839	758	757	658
EoEngland	31271	31460	31853	32365	31823	29828	26752	25501	30258	27346	25554	20507

About median price per m² based on sold & valuation price

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Hometrack HM Land Registry (England & Wales)	January 2016 - August 2025	Monthly	August 2025	Region/ LA/ Postcode Area	Calculated over a 3-month rolling window

Average time taken to sell

What does this page show?

This page sets out data on the average time taken to sell.

- Figure 21 shows average time to sell in weeks, for each district (solid lines) and the East of England region (grey dashes) from October 2023 (the earliest data available) to June 2025.
- Table 10 shows the average time take to sell in days, between July 2024 and June 2025
- Table 11 shows the size of the sample which drives the time to sell calculation. This is the first Bulletin which the sample size data has been available for, and helps us see how many homes the “market heat” data relies upon.

Notes & observations

- Figure 21 highlights the erratic nature of this data, with average time to sell strongly affected by individual properties and developments coming on-stream; this makes it difficult to see much of a pattern for each district or across the area. None of the lines look steady, they are all “up and down”, but mostly follow the line for the East of England, roughly.
- At June 2025, Figure 21 and Table 10 show East Cambridgeshire and Fenland having the slowest times to sell at 46.5 and 47 days respectively. Cambridge and West Suffolk saw the shortest time to sell at 32 days.
- Comparing July 2024 and June 2025, overall four districts saw an increase in the time to sell, 3 saw a decrease and one (Huntingdonshire) saw no overall change.

Note

The time taken to sell is calculated once a property has sold. So if a home has been on the market for some time, the month when the sale completes is the month that “long period of time” gets reported.

The average time to sell in weeks is calculated using the time taken from when a property is first listed on the market via Zoopla to the date the property was sold using data from Land Registry.

Figure 21 Change in average time taken to sell (days)

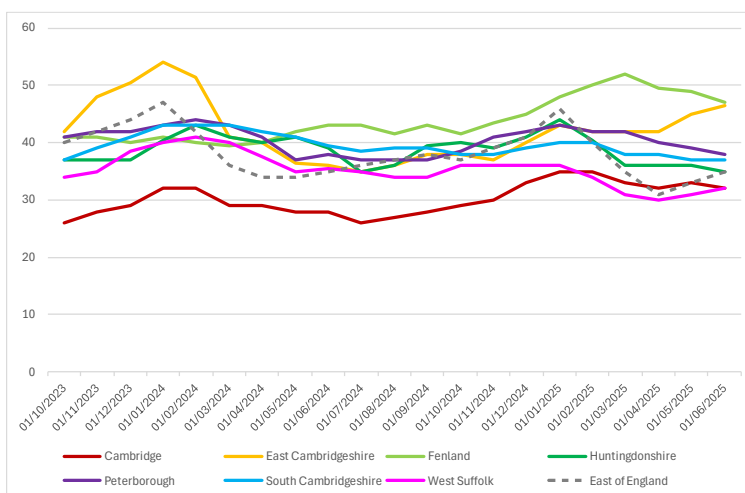


Table 10. Average time taken to sell (days)

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	↑↓
Cambridge	26	27	28	29	30	33	35	35	33	32	33	32	↑
East Cambs	35	36	38	38	37	40	43	42	42	42	45	46.5	↑
Fenland	43	41.5	43	41.5	43.5	45	48	50	52	49.5	49	47	↑
Huntingdonshire	35	36	39.5	40	39	41	44	40.5	36	36	36	35	→
Peterborough	37	37	37	38.5	41	42	43	42	42	40	39	38	↑
South Cambs	38.5	39	39	38	38	39	40	40	38	38	37	37	↓
West Suffolk	35	34	34	36	36	36	36	34	31	30	31	32	↓
East of England	36	37	38	37	39	41	46	40	35	31	33	35	↓

Table 11. Time to sell (days): sample size

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	699	666	679	704	657	633	601	610	614	583	625	681
East Cambs	446	444	453	480	430	409	411	429	419	394	422	442
Fenland	482	460	462	470	442	417	411	419	433	412	427	460
Huntingdonshire	719	715	676	672	619	577	572	598	638	642	689	742
Peterborough	931	972	966	962	946	918	863	856	874	890	915	941
South Cambs	1074	1100	1138	1131	1073	997	910	885	883	894	933	971
West Suffolk	663	685	707	712	657	618	614	635	629	658	710	790
East of England	17555	16708	16580	16821	16463	14111	13175	13767	16629	17434	17943	18001

About time taken to sell

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Zoopla Listings	Jan 2019 - Aug 2025	Monthly	Aug 2025	Region	3 month rolling window
Zoopla Listings	Jan 2019 - Aug 2025	Monthly	Aug 2025	LA/ Postcode Area	6 month rolling window

% of asking price achieved

Figure 22 % asking price achieved

What does this page show?

This page reports on the proportion of the asking price achieved when a property sells, known as “sales price to asking price”.

- Figure 22 shows the change in sales price to asking price across the districts (solid lines) and the region (grey dashes). This provides data from October 2023 to June 2025.
- Table 12 shows sales price to asking price as a percentage, every month from July 2024 to June 2025. For the first time in Edition 66, we also have data on the sample size used to calculate the % asking price achieved.

Notes & observations

- Figure 22 shows the highest sales to asking price ratios being seen in Cambridge. Table 12 shows that West Suffolk is a close second, at June 2025. At the other end of the scale, the lowest percentage of asking price achieved was seen in Fenland at 95.3%, followed by East Cambridgeshire at 95.7%.
- The East of England saw 96.4% of asking prices achieved in June 2025, many districts in our area saw similar levels.
- The percentage in Cambridge has been fairly level and significantly higher than all the other areas reported, since before April 2023. Fenland is often at the other end of the group.

Note: Comparing sales price to asking price

This page shows the typical proportion of the asking price that is achieved for all sales agreed over the month. The data is calculated using property listings on Zoopla taking the advertised asking price compared to the final sold price registered with Land Registry.

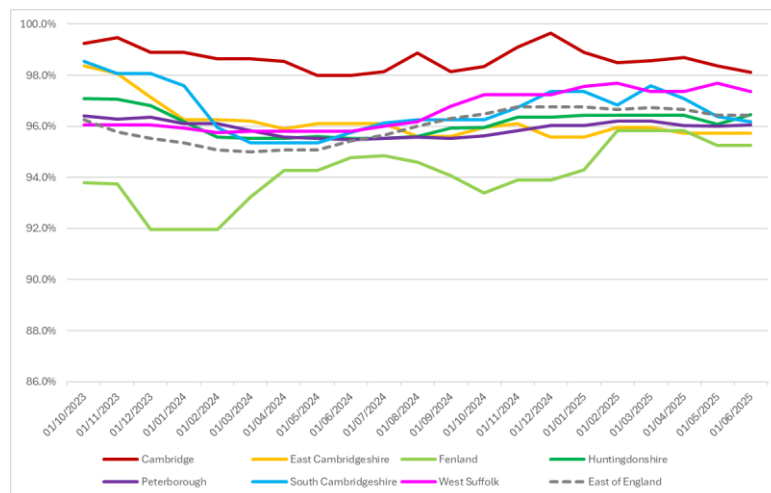


Table 12. Percentage of asking price achieved

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	98.1%	98.9%	98.1%	98.3%	99.1%	99.6%	98.9%	98.5%	98.6%	98.7%	98.4%	98.1%
East Cambridgeshire	96.1%	95.6%	95.6%	96.0%	96.1%	95.6%	95.6%	96.0%	96.0%	95.7%	95.7%	95.7%
Fenland	94.8%	94.6%	94.1%	93.4%	93.9%	93.9%	94.3%	95.8%	95.8%	95.8%	95.3%	95.3%
Huntingdonshire	95.5%	95.6%	95.9%	96.0%	96.4%	96.4%	96.4%	96.4%	96.4%	96.4%	96.1%	96.5%
Peterborough	95.5%	95.6%	95.5%	95.6%	95.8%	96.0%	96.0%	96.2%	96.2%	96.0%	96.0%	96.1%
South Cambridgeshire	96.1%	96.3%	96.3%	96.3%	96.7%	97.4%	97.4%	96.8%	97.6%	97.1%	96.4%	96.2%
West Suffolk	96.0%	96.2%	96.8%	97.2%	97.2%	97.2%	97.6%	97.7%	97.4%	97.4%	97.7%	97.4%
East of England	95.7%	96.0%	96.3%	96.5%	96.8%	96.8%	96.8%	96.7%	96.7%	96.7%	96.4%	96.4%

Table 13. Sample size for percentage of asking price achieved

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	179	214	210	226	225	227	203	172	194	159	147	125
East Cambridgeshire	119	121	115	131	139	133	137	143	155	130	115	113
Fenland	110	116	121	109	112	111	109	101	97	98	99	97
Huntingdonshire	315	317	313	320	328	317	293	267	275	242	220	211
Peterborough	262	283	249	271	290	288	278	269	292	256	236	220
South Cambridgeshire	257	273	263	288	313	282	291	287	324	276	238	236
West Suffolk	214	225	225	237	240	254	265	257	257	233	204	174
East of England	4956	5281	5408	5455	5245	5121	4635	4419	5349	4400	3592	2100

About Percentage of asking price achieved

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Zoopla/HM LR (England & Wales),	Aug 2022 - Aug 2025	Monthly	Aug 2025	Region	3 month rolling window
Zoopla/HM LR (England & Wales),	Aug 2022 - Aug 2025	Monthly	Aug 2025	LA/ Postcode Area	6 month rolling window

Private rents and Local Housing Allowance

What does these pages show?

- Figure 23 shows median monthly private rents across our area, at district level. We hope in future editions to share more detailed maps.
- Figure 24 sets out the median private rent in each district, by property size /type. In this edition, the breakdown is more detailed than in the past, and covers
 - 1 bed flat
 - 2 bed flat
 - 2 bed house
 - 3 bed house
 - 4 bed house
- Table 11 sets out weekly median rents alongside the “main” local housing allowance (LHA) rate for each district. It’s a rough comparison as district and broad rental market area (BRMA) boundaries are different from each other - so this can only ever be approximate.
- Figure 25 shows broad rental market areas (colour shaded, see key with the map) with district boundaries using dark blue lines. You can find the map on-line [here](#).
- Table 15 sets out monthly local housing allowance rates. These are set by the Valuation Office Agency based on a survey of their own (not Hometrack) data. In this edition we have simply set out the current LHA rates.
- Table 16 sets out the sample size used for private rents, which is a first in this Edition and responds to previous feedback that it would be good to know what the sample size is, to assess the reliability of the Hometrack private rent data.
- For more detail on local housing allowances and broad rental market areas, please visit www.voa.gov.uk.

Notes & observations

- Figure 23 shows the highest private rent levels are in Cambridge and South Cambridgeshire. East Cambridgeshire and West Suffolk follow. Huntingdonshire and Peterborough rents are slightly lower, while the lowest rents are found in Fenland.
- Figure 24 shows the median rent by property size / type. This shows a similar pattern of rent levels as outlined in Figure 23. The values are set out in Table 14.

Figure 23 Median monthly private rent asking price (per district)

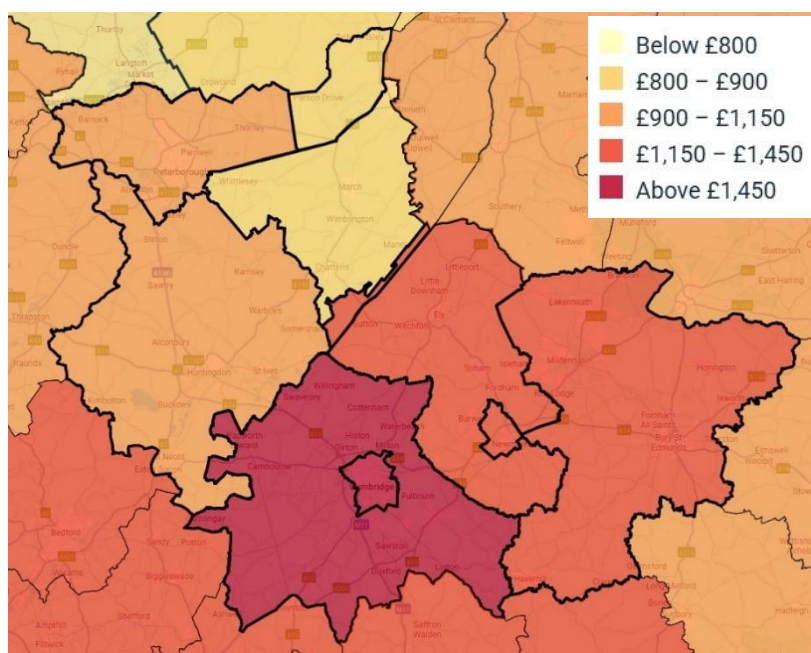
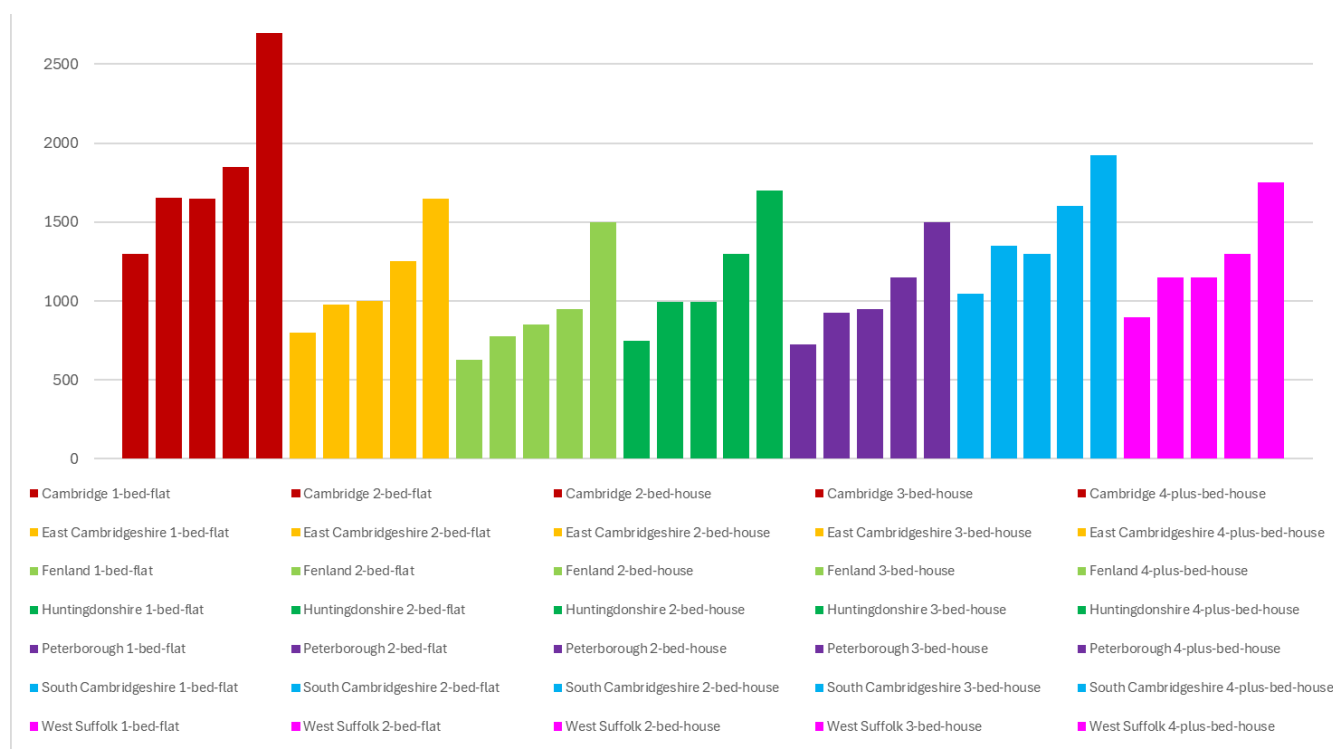


Figure 24 Median rent by size for each district, at end of June 2025



A word about local housing allowances (LHA)

Local housing allowance (LHA) rates are not set for each individual district. The Valuation Office Agency has defined what are called Broad Rental Market Areas instead, which often cover more than one district area.

Figure 25 sets out the boundaries for some of our main local BRMAs. These are the areas which are used, to set Local Housing Allowances – and these dictate the amount of government funding which a person can use to help pay their rent, if they are renting privately.

So, the LHA rate is important when a person is working out if they can afford the rent being asked, for a local property. It also influences the amount of rent social landlords can charge, but that's a more complicated formula!

In Table 14 we set out the median private rent being asked each month over the past year, in each district, by each property size/type. And in the final columns of Table 14 we've added the LHA rates for that area.

To help compare how much rent is covered by the LHA, we've done the LHA as a % of the private rent asked for, in June 2025. Table 16 sets out the sample size used for rents.

A table setting out the LHAs across England can be found here

https://assets.publishing.service.gov.uk/media/679c9493c496e5d3ddafb61d/2025-26_LHA_TABLES.xlsx

Table 14. Median rental asking price (£, monthly) and % of June 2025 rent from Hometrack which LHA represents. Bold = LHA exceeds rent

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	LHA rates (rounded) (colours relate to Figure 25)
Cambridge													Cambridge BRMA
1 bed flat	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	898 (69%)
2 bed flat	1600	1650	1650	1650	1651	1651	1651	1651	1651	1651	1675	1651	947 (57%)
2 bed hse	1600	1600	1600	1600	1600	1600	1650	1650	1650	1650	1650	1650	947 (57%)
3 bed hse	1800	1800	1800	1800	1850	1850	1850	1850	1850	1850	1850	1850	1122 (61%)
4 bed hse	2600	2650	2699	2699	2700	2650	2650	2699	2699	2700	2650	2699	1446 (54%)
East Cambridgeshire													Cambridge BRMA
1 bed flat	801	801	801	801	823	801	823	812	801	801	800	801	898 (112%)
2 bed flat	900	901	901	925	949	949	950	950	950	950	950	975	947 (97%)
2 bed hse	1000	1000	1000	1000	1000	1001	1001	1048	1001	1048	1048	1001	947 (95%)
3 bed hse	1248	1250	1250	1295	1295	1248	1250	1300	1295	1250	1250	1250	1122 (90%)
4 bed hse	1600	1600	1600	1700	1650	1600	1600	1650	1675	1650	1650	1650	1446 (88%)
Fenland													Kings Lynn BRMA Peterboro' BRMA
1 bed flat	625	624	620	600	625	625	625	625	625	629	625	625	773 (124%) 449 (72%)
2 bed flat	749	750	750	765	770	775	775	750	749	749	750	775	873 (113%) 573 (74%)
2 bed hse	801	823	823	825	823	825	823	823	823	823	825	849	873 (103%) 573 (67%)
3 bed hse	950	950	950	950	950	950	950	950	950	950	950	950	947 (100%) 648 (68%)
4 bed hse	1350	1399	1397	1399	1399	1399	1450	1400	1400	1450	1499	1499	1346 (90%) 922 (62%)
Huntingdonshire													Huntingdon BRMA Peterboro' BRMA
1 bed flat	728	750	749	749	749	750	750	750	750	775	775	750	673 (90%) 449 (60%)
2 bed flat	949	949	949	950	950	950	950	975	975	975	975	996	893 (90%) 573 (58%)
2 bed hse	950	950	950	950	950	975	975	995	995	995	995	995	893 (90%) 573 (58%)
3 bed hse	1226	1248	1250	1249	1250	1250	1295	1295	1295	1295	1295	1298	1097 (85%) 648 (50%)
4 bed hse	1694	1650	1698	1697	1698	1698	1695	1695	1695	1700	1698	1698	1311 (77%) 922 (54%)
Peterborough													Peterborough BRMA
1 bed flat	702	702	702	723	723	723	723	723	725	725	725	723	449 (62%)
2 bed flat	897	901	923	923	923	925	925	925	925	925	923	923	573 (62%)
2 bed hse	900	901	923	923	925	925	925	925	949	949	949	949	573 (60%)

Figure 25 Broad Rental Market Area (BRMA) boundaries



Would really welcome your thoughts on all this rent and LHA data – is it useful? Is it too confusing? What is useful to you?

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	LHA rates (rounded) (colours relate to Figure 25)
Peterborough (ctd)													Peterborough BRMA
3 bed hse	1100	1100	1100	1100	1100	1100	1100	1109	1100	1148	1148	1148	648 (56%)
4 bed hse	1400	1400	1400	1450	1450	1450	1495	1499	1499	1500	1499	1500	922 (61%)
South Cambridgeshire													Cambridge BRMA
1 bed flat	950	970	1000	1000	1001	1000	975	1001	1001	1048	1050	1048	898 (86%)
2 bed flat	1350	1350	1350	1350	1350	1350	1352	1352	1373	1352	1352	1352	947 (70%)
2 bed hse	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	947 (73%)
3 bed hse	1500	1500	1500	1513	1551	1560	1573	1575	1575	1595	1599	1599	1122 (70%)
4 bed hse	1900	1950	1950	1900	1924	1900	1924	1950	1950	1924	1900	1924	1446 (75%)
West Suffolk													Bury St Edmunds BRMA
1 bed flat	800	849	849	849	850	850	850	850	850	895	895	895	628 (70%)
2 bed flat	1100	1100	1100	1100	1100	1125	1125	1125	1100	1125	1150	1150	773 (67%)
2 bed hse	1100	1100	1125	1125	1126	1148	1148	1148	1148	1150	1150	1150	773 (67%)
3 bed hse	1272	1270	1300	1300	1300	1300	1300	1300	1300	1300	1300	1300	952 (73%)
4 bed hse	1740	1700	1698	1698	1698	1699	1698	1698	1698	1700	1750	1750	1296 (74%)

About private rents and Local Housing Allowance

Source	Timespan	Last updated	Time interval
Hometrack: private rents: Zoopla Listings	Jan 2016 - Aug 2025	Aug 2025	Monthly, 12 month rolling window
VOA: local housing allowance rates	April 2025 to March 2026	Jan 2025	Annual update, 2025 rates provided

In Table 15 we present local monthly LHA rates unrounded. In the past we shared the weekly LHA rates and compared them to weekly rents. LHA rates are updated in January, ready for the following financial year (i.e. April to March).

Table 15. Monthly Local Housing Allowance rates 2025-26

	Shared accommodation rate ⁴	1 bed	2 bed	3 bed	4 bed
Bury St Edmunds	£450.10	£628.29	£772.89	£952.38	£1,296.45
Cambridge	£524.90	£897.52	£947.40	£1,121.90	£1,446.03
Huntingdon	£423.84	£673.14	£892.54	£1,096.98	£1,311.40
Kings Lynn	£410.45	£772.89	£872.60	£947.40	£1,346.28
Peterborough	£303.33	£448.76	£573.43	£648.22	£922.48

Table 16. Sample size unique listings – rent

	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Cambridge	3,430	3,331	3,286	3,227	3,254	3,228	3,259	3,225	3,275	3,314	3,386	3,436
East Cambs	667	644	642	640	648	636	651	652	667	676	685	685
Fenland	836	810	799	789	774	769	785	788	806	797	807	804
HDC	1,182	1,120	1,079	1,058	1,046	1,030	1,014	1,001	990	975	960	972
Peterb'	2,543	2,475	2,437	2,395	2,365	2,353	2,389	2,394	2,427	2,444	2,516	2,590
South Cambs	1,703	1,685	1,657	1,615	1,644	1,649	1,673	1,655	1,619	1,597	1,639	1,680
West Suffolk	1,406	1,382	1,333	1,319	1,323	1,314	1,281	1,284	1,282	1,285	1,291	1,272
E of England	55,788	54,639	53,930	53,090	53,353	53,551	54,275	54,004	54,574	54,850	55,619	56,546

Affordability ratios

For Edition 66 we are “resting” the affordability ratio article.

With so much learning to adapt the new-look data in the Bulletin format, we decided to leave affordability ratios until Edition 67 when much of the Bulletin will have adapted to the new data layout, and we can progress to the affordability article taking a little more time to ensure it's done correctly.

⁴ Shared accommodation rate applies to 1 bed accommodation with shared facilities

Comparing housing costs across tenures and sizes

What does this page show?

Table 17 compares MONTHLY housing cost by size and tenure.

Small sample sizes mean we treat some 'outliers' with caution. In this

Edition unfortunately we are unable to include new build prices – however we hope to restore these in Edition 67. This is a major gap locally, as new build prices were often the highest of all tenures in the past.

In Edition 66, the highest monthly cost almost everywhere is commanded by private rented homes. However, it is important to remember that these prices simply reflect the calculated monthly cost of each tenure and size, and do not reflect things like deposits, ground rents, service charges etc (see note).

For each row the lowest weekly cost is highlighted in pale grey/green and the highest in pale pink. The point of this shading is to show that monthly housing costs are frequently lowest for some of the social housing tenures, and highest for private rented housing or home ownership. However shared ownership can prove cost effective, for example in Fenland, 1 and 2 bed shared ownership flats are the most affordable option! Small differences across the area can be useful context when a household is considering their housing choices, or a developer is assessing developing homes in a new area.

Table 17. Comparing weekly cost by tenure, size & district (£)

	Council social rent (net)	Council affordable rent (gross)	Housing Assn social rent (net)	Housing Assn social rent (gross)	Housing Assn affordable rent (gross)	80% of median rent	Median Monthly rent	Shared ownership	Buy LQ resale	Buy median resale
Cambridge										
1-bed flat	420	698	468	520	676	1040	1300	958	902	1069
2-bed flat	490	771	550	602	732	1340	1675	1312	1270	1490
2-bed house						1320	1650	1570	1471	1725
3-bed house	555	906	607	611	828	1480	1850	2072	1770	2098
East Cambridgeshire										
1-bed-flat			425	446	589	640	800	490	557	569
2-bed-flat			494	503	698	760	950	682	642	686
2-bed-house						838	1048	926	922	1031
3-bed-house			550	555	771	1000	1250	1162	1137	1290
Fenland										
1-bed-flat			390	412	442	500	625	314	265	376
2-bed-flat			433	451	550	600	750	407	459	471
2-bed-house						660	825	675	647	722
3-bed-house			481	485	637	760	950	836	824	927
Huntingdonshire										
1-bed-flat			403	433	550	620	775	502	490	569
2-bed-flat			464	485	667	780	975	675	671	755
2-bed-house						796	995	879	824	941
3-bed-house			507	516	789	1036	1295	1121	1059	1235
Peterborough										
1-bed-flat			368	399	455	580	725	412	328	431
2-bed-flat			433	451	559	738	923	455	482	529
2-bed-house						759	949	659	647	765
3-bed-house			464	468	620	918	1148	863	824	941
South Cambridgeshire										
1-bed-flat	438	615	446	477	659	840	1050	722	725	871
2-bed-flat	511	737	537	555	784	1082	1352	879	815	953
2-bed-house						1040	1300	1140	1098	1257
3-bed-house	542	884	607	615	893	1279	1599	1476	1373	1545
West Suffolk										
1-bed-flat			386	390	550	716	895	597	490	559
2-bed-flat			446	455	654	920	1150	663	536	676
2-bed-house						920	1150	848	824	941
3-bed-house			490	503	741	1040	1300	1099	980	1137
East of England										
1-bed-flat			416	455	581	797	996	706	569	706
2-bed-flat			481	503	711	1040	1300	942	727	941
2-bed-house						960	1200	1107	892	1118
3-bed-house			542	546	815	1199	1499	1381	1098	1373

Note

The table reflects weekly cost of each size and tenure home, not the cost associated with raising a deposit or accessing a mortgage. Figures exclude ground rent & service charges. For ownership, the loan to value (LTV) ratio used is 80%

Source	Timespan	Last updated
Average Local Authority social and 'affordable' rents		
Local authority rent: only available in Cambridge and South Cambs, data available here . Data used in this bulletin comes from Cambridge and SCDC LADR forms which report (a) low-cost rental general needs stock, total weighted average weekly net rent; and (b) affordable rent general needs stock, average weekly gross rent. Supported, LCHO and homes excluded. Annual update		
LADR 2023-24	Apr 2023 to Mar 2024	March 2025
Average Housing Association social and 'affordable' rents		
Average rent reported in Homes England's SDR data return reporting on social and affordable rents, data available here . General needs housing only, no service charges included. For social rent both net and gross rent figures are provided (for comparison). For Affordable Rent, only the gross rent figure is available. Data from SDR "geographic look-up" tool. Annual update		
HCA SDR 2023-24	Apr 2023 to Mar 2024	March 2025
Intermediate rent and median private rent		
The weekly cost of private renting is the median rent for advertised properties in local area. The weekly cost of Intermediate Rent represents 80% of the median rent for advertised private properties in the local area.		
Hometrack	Jan 2016 - Aug 2025	Aug 2025
Buying a lower quartile new build / resale		
The cost of buying with a mortgage is based on the capital and interest cost of servicing a mortgage for 85% of the median value of a property in the area, based on a 25-year mortgage term and the average prevailing mortgage rate. Uses Hometrack lower quartile and median values.		
Hometrack	Jan 2016 - Aug 2025	Aug 2025
Median cost of buying a 40% new build HomeBuy		
The weekly cost is derived from Hometrack's median house price data. The cost excludes ground rent and service charges. The rent element is assumed at 2.75% and mortgages payments derived from average building society rates (currently 7.2%). Loan-to-value is assumed at 90% i.e. the buyer makes a 10% deposit on the portion of the property they are buying, and it is a 25-year mortgage term.		
Hometrack	Jan 2016 - Aug 2025	Aug 2025
Median cost of buying a new build / resale		
"New build" sales are counted when a property was sold in the same year it was built. Values are based on Hometrack data - only where the surveyor provides "year built" date to Land Registry. This may not always happen, and there are sometimes delays so new build values are reported late.		
Hometrack	Jan 2016 - Aug 2025	Aug 2025

Ladders of housing affordability

Table 17 is used to create our "ladders" graphic.

- Weekly housing costs from page 17 are presented here in the format of ladders. The aim is to help compare the cost of different size and tenure homes, between districts.
- Because the ladders keep growing, and we are trying to keep the graphic on one page, the 'price' scale has been compressed so each "row" or rung represents a £19 chunk of weekly housing cost. These are set out in the left-hand column. We are presenting the two former districts which make up West Suffolk as a joint pink ladder. Where costs are different, the average is used.
- The weekly cost of each tenure and size of homes is included in the ladder diagram, the source of data is the same as for Table 17 and sources are set out in full in the source data table, above.
- For social and affordable housing, which may be provided by housing associations or local authorities, we have added net (N) and gross (G) rents. Though a little more complex this enables comparison between tenures at the 'most affordable' end of each ladder.

£2050-2099	3 H Med resale 3 H Shared own	2098 2072						
£2000-2049								
£1950-1999								
£1900-1949								
£1850-1899	3 H Pri rent	1850						
£1800-1949								
£1750-1799	3 H LQ resale	1770						
£1700-1749	2 H Med resale	1725						
£1650-1699	2 F Pri rent 2 H Pri rent	1675 1650						
£1600-1649								
£1550-1599	2 H SO	1570						
£1500-1549								
£1450-1499	2 F Med resale 3 H 80% of pri rent 2 H LQ resale	1490 1480 1471						
£1400-1449								
£1350-1399								
£1300-1349	2 F 80% of pri rent 2 H 80% of pri rent 2 F Shared own 1 F Pri rent	1340 1320 1312 1300						
£1250-1299	2 F LQ resale	1270						
£1200-1249								
£1150-1199								
£1100-1149								
£1050-1099	1 F Med resale	1069						
£1000-1049	1 F 80% of pri rent	1040						
£950-999	1 F Shared own	958						
£900-949	3 H LA aff rent G 1 F LQ resale	906 902						
£850-899								
£800-849	3 H HA aff rent G	828						
£750-799	2 F/H LA aff rent G	771						
£700-749	2 F/H HA aff rent G	732						
£650-699	1 F LA aff rent G 1 F HA aff rent G	698 676						
£600-649	3 H HA soc rent N 3 H HA soc rent N 2 F/H HA soc rent G	611 607 602						
£550-599	3 H LA soc rent N 2 F/H HA soc rent N	555 550						
£500-549	1 F HA soc rent G	520						
£450-499	2 F/H LA soc rent N 1 F HA soc rent N	490 468						
£400-449	1 F LA soc rent N	420						
£350-399								
£300-349								
£250-299								
£200-249								
£150-199								
£100-149								
£50-99								
£0-49								
PCM	Cambridge	East Cambs	Fenland	HDC	Peterborough	South Cambs	West Suffolk	East of England

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About Hometrack

If you're involved in the residential property market, you need Hometrack. Leading businesses across the property ecosystem, lenders, investors, advisers, developers and housing associations rely on our fast, accurate market intelligence and valuations to decide where to invest and develop, what to lend on and how to optimise assets.

Founded in the UK in 1999, Hometrack are trusted by major mortgage lenders, housebuilders and government bodies. We launched our market-leading AVM (automated valuation model) in 2002 and now provide over 50 million automated valuations each year. We are expanding into European markets via partnerships with market leaders such as the EAA and Calcasa.

Hometrack is part of Zoopla, owner of some of the UK's most trusted digital platforms including Zoopla, PrimeLocation and Property Software Group. Hometrack is also a founding member of the European AVM Alliance.

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Maps

Figure 27 East of England region shows the East of England in orange, boundaried by a blue line.

Figure 28 shows and the districts covered in this bulletin in green, which are:

- Cambridge
- East Cambridgeshire
- Fenland
- Huntingdonshire
- Peterborough.
- South Cambridgeshire
- West Suffolk

Figure 29 highlights the boundaries of the districts in the Bulletin in slightly more detail.

Key to colours throughout bulletin:

Cambridge		South Cambs	
East Cambs		West Suffolk	
Fenland		East of England	
HDC		England	
Peterborough			

About the Bulletin

This bulletin provides a picture of our local housing market to assist with market assessments, viability and other housing analysis. It has been produced almost every 3 months since 2009! All bulletins can be found at:

www.cambridgeshireinsight.org.uk/housingmarketbulletin

Feedback

Your feedback on the Bulletin is very welcome! Please get in touch with Sue. You can call me 07715 200 730 or e-mail sue.beecroft@cambridge.gov.uk

Bulletin updates

	Edition 66	Edition 67	Edition 68	Edition 69
Data for	June 2025	Sept 2025	Dec 2025	March 2026
Bulletin publication	October 2025 (was delayed!)	Dec 2025	Mar 2026	June 2026
Notes	This Edition!	Xmas 2025 edition (next one)	March 2026 edition	June 2026 edition



Figure 27 East of England region



Figure 28 Area covered by bulletin (in green)



Figure 29 Districts in slightly more detail



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Metadata

Time Series	Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Metric	Rolling Period: calculated over a...
Sold & Valuation Price (Bed count/type)	Hometrack HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Region/ LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	3 month rolling window
Sold & Valuation Price (Bed count/type)	Hometrack HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Postcode District	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	6 month rolling window
Sold & Valuation Price (Property Type)	Hometrack HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Region/ LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	3 month rolling window
Sold & Valuation Price (Property Type)	Hometrack HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Postcode District	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	6 month rolling window
Sold Price	HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Region/ LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	3 month rolling window
Sold Price	Hometrack HM LR(England & Wales)	Jan 2016 - Aug 2025	Monthly	Aug 2025	Postcode District	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	6 month rolling window
Time to sell	Zoopla Listings	Jan 2019 - Aug 2025	Monthly	Aug 2025	Region	Median	3 month rolling window
Time to sell	Zoopla Listings	Jan 2019 - Aug 2025	Monthly	Aug 2025	LA/ Postcode Area	Median	6 month rolling window
Sale Asking Price	Zoopla Listings	Jan 2016 - Aug 2025	Monthly	Aug 2025	Region/ LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	3 month rolling window
Sale Asking Price	Zoopla Listings	Jan 2016 - Aug 2025	Monthly	Aug 2025	Postcode District	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	6 month rolling window
Asking price achieved	Zoopla/HM LR(England & Wales),	Aug 2022 - Aug 2025	Monthly	Aug 2025	Region	Median	3 month rolling window
Asking price achieved	Zoopla/HM LR(England & Wales),	Aug 2022 - Aug 2025	Monthly	Aug 2025	LA/ Postcode Area	Median	6 month rolling window
Rental Asking Price	Zoopla Listings	Jan 2016 - Aug 2025	Monthly	Aug 2025	Region/ LA/ Postcode Area/ Postcode District	Lower Quartile/Median/Upper Quartile/ Ninetieth Percentile	12 month rolling window