

Housing Market Bulletin

for Cambridgeshire
Peterborough & West
Suffolk

Edition 67

Published December 2025, based on
September 2025 Hometrack data

Welcome

Welcome to Edition 67 of our longstanding housing market bulletin.

Well, we seem to have weathered the many changes of 2025, and the Bulletin is still running! We moved over to a Word format at Ed 65 and have navigated a complete change to the Hometrack system at Ed 66.

In this edition I've added some new combinations of data which may (or may not!) be helpful, made possible by the changes to Hometrack. As always, your feedback is VERY welcome – if you think there is too much information or it is too complex, please just tell me and I can remove the new pages. The main changes from Ed 66 onward are:

- We have West Suffolk data instead of the 2 old constituent districts.
- Weekly costs are now presented as monthly costs; especially for rents, LHAs and the Ladders.
- We can now see data for 1 bed flat, 2 bed flat, 2 bed house, 3 bed house and 4+ bed house rather than just 1, 2 and 3+ bed.
- Medians are again used instead of averages.
- We can now look back to 2016, so we can present data over the last 12 months and 9 years.
- We have added an East of England 'ladder' for the first time
- All figures, tables and page cross-references throughout are now "clickable" so you can find what's being referred to quickly. You may need to hold "ctrl" on the keyboard and click. Links are [blue](#).
- We have added a page of links to all the figures, and a metadata (source info) table on the last page.
- Maps and England data are still being worked on by Hometrack, we hope they'll become available soon, for our comparison tables & graphs.

As always, you can look back at old editions by following [this link](#), if you want to compare "old" and "new".

In Edition 67 you may notice, instead of having the same colour key on every chart, we have included the key once on each page where it's needed to save

a little space and repetition.

There are also notes to explain some of the metrics used... look for the [i](#)

Thanks for continuing to support the Bulletin, and Merry Christmas – hope the New Year brings good things to us all!

Sue Beecroft

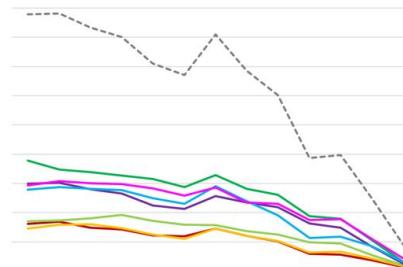
Housing Coordinator

In brief...

Hometrack summary Oct 2025

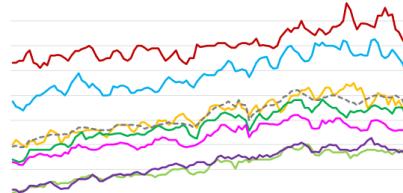
- Budget uncertainty prompts buyers to 'wait and see', leading to the first annual decline in sales agreed in two years
- Buyer demand is down 8% compared to last year and sales agreed are down 3% as activity cools - notably in higher value areas
- House price inflation is steady at +1.3%, with prices flat in southern England but rising >2% elsewhere
- More homes for sale (+7%) is giving serious buyers greater choice
- Average time to sell is up to 37 days, around 10% longer than last year. Realistic pricing is key to securing home sales
- Some 350,000 homes worth £100bn are progressing through the sales pipeline - the largest in four years.

Number of "real" sales



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

Median price based on real sales



- Looking back to 2016, median prices based on real sales are creeping upwards, although month by month there are lots of rises and falls

Market temperature

- At Sept 2025 the time taken to sell was slowest in East Cambs and Fenland. In Sept 2025 the quickest sales went through in 37 days, in Huntingdonshire and West Suffolk.
- The percentage of asking price achieved was highest in Cambridge (98%), and lowest in Fenland (94%).

Private rents and LHAs

- Rent data has had a quite serious make-over in Edition 66, now being presented monthly rather than weekly; and for a greater range of home types.
- Compared to LHA rates (which were frozen for 2025/26) we see many LHA rates failing to cover the majority of median private rents in our area. East Cambs and Fenland are where some median rents are covered by LHA (depending where the property is located).

Ladders

- In this edition, the ladders are presented as monthly housing costs, for a wider range of property types as mentioned above.
- The good news is, we have been able to add a ladder for the East of England, for comparisons.
- Unfortunately although it will be available in future, Edition 67 again does not include the monthly cost of new build homes. We hope this will return!

Background

- The background sets out some maps for the area covered, and contact details should you have suggestions of feedback.
- The last page gives sources: a table of the figures, and some metadata.

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Hometrack UK price index, October 2025

+1.3%

UK house price inflation (Sept 2025)

-3%

sales agreed % year-on-year

37

Average time to sell (days)

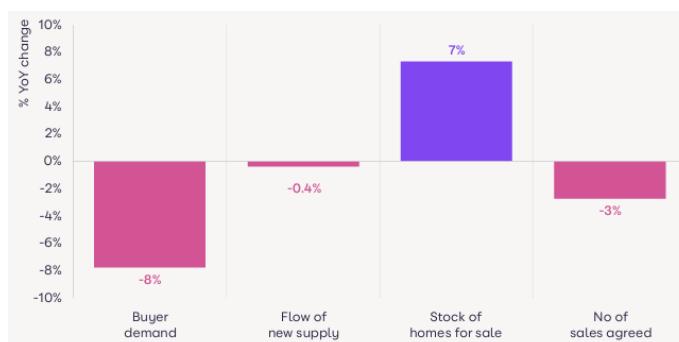
-8%

Year-on-Year change in home buyer demand

Summary

- Budget uncertainty is prompting buyers to 'wait and see', leading to the first annual decline in sales agreed in two years
- Buyer demand is down 8% compared to last year and sales agreed are down 3% as activity cools - more notable in higher value markets
- House price inflation is steady at +1.3%, with prices flat in southern England but rising by more than 2% elsewhere
- More homes for sale (+7%) is giving serious buyers greater choice
- Average time to sell is up to 37 days, c.10% longer than last year
- Realistic pricing is key to securing home sales
- Some 350,000 homes worth £100bn are progressing through the sales pipeline - the largest in four years

Figure 1 Budget uncertainty drives 'wait and see' on sales and buyer demand



"Budget uncertainty is driving a 'wait and see' approach for new buyers while committed movers continue to try secure sales ahead of the year end. Realistic pricing remains key for sellers securing a sale."

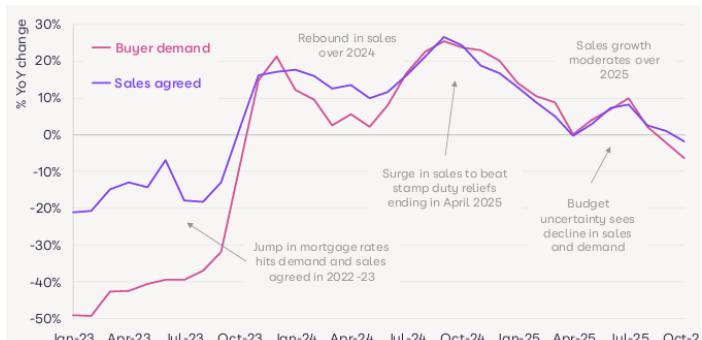
Richard Donnell, Executive Director - Research

Buyer demand dips 8% on Budget uncertainty

- Uncertainty over potential Budget measures in November is prompting many homebuyers, especially those early in their search, to adopt a 'wait and see' approach. This has led to the first annual fall in new sales agreed in two years (October 2023).
- Compared with a year ago¹, buyer demand is down 8% and sales agreed are down 3%, as the usual pre-Christmas slowdown begins 6 to 8 weeks earlier than normal. The dip also reflects comparison with a strong final quarter in 2024, when many buyers rushed to complete purchases before the end of stamp duty reliefs in April 2025.
- There are 7% more homes for sale than a year ago¹ and committed buyers continue to push ahead with purchases ahead of the year end. Over the last four weeks, sales agreed have been higher than last year in Scotland (+3%), Yorkshire & the Humber (+4%), the South West (+1%), and the West Midlands (+1%).
- However, southern England and Wales are seeing a

sharper slowdown, with sales agreed down 9% in Wales, 8% in the South East, 6% in the East of England, and 5% in London.

Figure 2 Sales agreed and buyer demand fall for the first time in 2 years



Property tax speculation hits higher value homes

- There remains a strong link between market activity and price levels, with the sharpest slowdown in sales, listings, and buyer demand for homes priced above £500,000. This explains why the decline in sales is concentrated across southern England, where higher-value homes make up a larger share of the market.
- Speculation about potential tax reforms, including higher council tax, replacing stamp duty with an annual property tax, and introducing capital gains tax on purchases over £1.5 million, is prompting early stage buyers to pause their search until after the Budget.

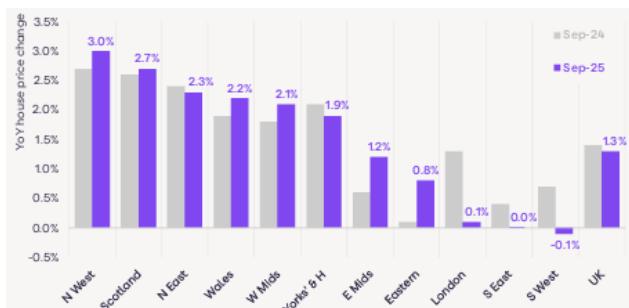
UK house price inflation +1.3%

- House price inflation has slowed over 2025 and currently stands at 1.3%, broadly in line with the level a year ago. The divide in price inflation between southern England and the rest of the UK is growing.
- Price inflation is running at over 2% across Scotland, Wales and northern regions of England, broadly in line with last year. House price inflation has come to a standstill across southern regions of England as affordability pressures and weaker demand limit price increases.

37

Days to sell a property - from first listing to sale agreed subject to contract

Figure 3 House price inflation stalls in south and continues across rest of GB



Time to sell 10% slower than a year ago

- A rise in homes for sale and softer demand have pushed up the average time to sell to 37 days², around 10% longer than a year ago.
- Sales take longer across southern England, reaching 45 days in London - about 20% slower than last year.



- The fastest sales continue to be in northern England and Scotland, where demand remains stronger. This measure reflects the period from first listing to a sale being agreed. Homes requiring price reductions typically take longer to sell, underlining the importance of realistic pricing.

Figure 4 Time to agree a sale 10% slower than a year ago, up 20% in London

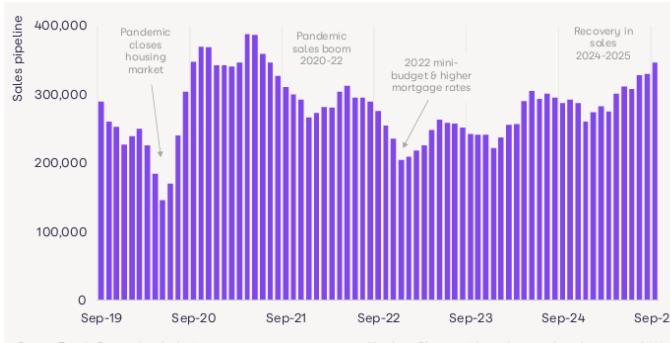


Largest sales pipeline for 4 years, worth £100bn

- While market activity is currently slowing, it is important to note that the sustained increase in sales activity over the last two years has created the largest pipeline of agreed sales working their way through to completion. It takes, on average, 5 to 6 months to complete a property purchase and move in after agreeing to buy a home.
- We estimate that there are almost 350,000 homes, worth over £100bn, currently working their way through the sales process. This is the largest sales pipeline in over four years, since May 2021, when the pandemic boom was in full swing. Stability in mortgage rates has brought more sellers into the market, many of whom are also buyers, alongside strong demand from first-time buyers.

£100bn
Value of homes
in the sales
pipeline working
through to
completion

Figure 5 Largest sales pipeline for 4 years



Outlook

The housing market has made a strong recovery over the past two years, with sales volumes now close to the 10-year average of 1.2 million transactions a year.

However, the wider economic backdrop is not strong enough to drive further growth in sales volumes in the near term. We expect the number of sales agreed to stabilise at current levels, with continued demand for well-priced homes.

House price inflation is forecast to end the year at 1-1.5%, with prices under pressure across southern England, where affordability is most stretched and stamp duty costs are highest.

The removal of stamp duty at the Budget, the subject of ongoing media speculation, would provide a major boost to activity and support economic growth. However, homebuyers are cautious about what new taxes might replace it.

House Price Index - Country, region and city summary

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.

Figure 6 Zoopla housing price index, city summary, July 2025



Note

The information and data in this report were 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.



Zoopla House Price Index, city summary, September 2025 index

Sparklines show last 12 months trend in annual and monthly growth rates - red bars are a negative value - each series has its own axis settings providing a more granular view on price development.



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.

Figure 7 Zoopla House Price Index, city summary, September 2025

	Average price	%YoY Sep-25	%YoY Sep-24	Monthly trend	Annual trend
United Kingdom	£270,000	1.3%	1.4%		
20 City Composite	£310,000	1.0%	1.7%		
Belfast	£195,400	7.9%	6.4%		
Liverpool	£166,600	3.0%	3.5%		
Manchester	£234,500	2.6%	3.0%		
Newcastle	£160,800	2.3%	2.5%		
Glasgow	£158,700	2.1%	3.6%		
Leeds	£216,000	2.0%	2.3%		
Sheffield	£176,800	2.0%	2.2%		
Birmingham	£214,900	1.7%	1.9%		
Cardiff	£260,700	1.6%	2.1%		
Edinburgh	£278,800	1.6%	1.9%		
Bristol	£342,900	1.2%	1.5%		
Leicester	£228,500	0.9%	0.8%		
Nottingham	£206,500	0.5%	1.7%		
Oxford	£448,100	0.2%	2.0%		
London	£529,800	0.1%	1.3%		
Portsmouth	£276,500	-0.3%	-0.1%		
Aberdeen	£138,500	-0.6%	0.1%		
Cambridge	£468,800	-0.7%	1.6%		
Southampton	£258,200	-0.8%	1.7%		
Bournemouth	£318,000	-1.9%	1.0%		

Source: Zoopla House Price Index. Sparklines show last 12 months trend in annual and monthly growth rates – red bars are a negative value – each series has its own axis settings providing a more granular view on price development.

Sources

Pages 2 to 4 are edited from

<https://www.hometrack.com/wp-content/uploads/2025/10/UK-House-Price-Index-Oct25-HT.pdf>

You can sign up for all the latest research from Zoopla at

<https://advantage.zpg.co.uk/>

Number of sales and valuations

This page shows...

- 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, combined with Hometrack data which adds valuation data from the top 20 mortgage providers across the country. The data is presented monthly over the past year.
- [Figure 7](#) 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 2,000 sales and valuations). This way, we can compare the trends across the region and the districts
- [Figure 8](#) shows the same data over the past 9 years, again using the left and right axes for district and regional values.
- [Table 1](#) shows the number of sales and valuations for each district and the East of England over the past 12 months (Sept 2024 to Sept 2025). We are discussing with Hometrack whether the new data system can include an England total, for comparison purposes.

Key

Cambridge	East Cambridgeshire	Fenland
Peterborough	South Cambridgeshire	West Suffolk
Huntingdonshire		
— — — East of England		

Notes & observations

- [Figure 7](#) shows reasonably similar trends for the districts and the region since September 2024.
- There is also a similarity in the lines for districts and the region since 2016, looking at [Figure 8](#). This is a new graph, we have not previously 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 1](#) 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.
- In past editions we have seen that the number of sales + valuations drop over the most recent 6 months, picking up once more sales have been reported via the Land Registry system. There is no reason to believe that pattern has changed.

Table 1. Number of sales + valuations

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	535	560	534	511	435	420	499	436	406	329	342	302	169
ECDC	429	476	499	461	392	365	455	415	374	294	314	271	162
Fenland	536	551	576	568	500	477	508	482	456	394	397	332	193
HDC	1,157	1,100	1,105	1,045	985	920	1,026	929	909	770	785	622	342
Peterboro'	969	965	947	890	781	758	881	840	779	650	633	556	330
SCDC	887	923	933	879	811	753	901	776	672	512	589	518	307
WSuffolk	870	934	940	894	838	777	890	799	806	697	721	593	338
EoEngland	33,773	34,368	33,785	31,789	28,530	27,166	31,832	28,719	26,866	21,693	23,079	19,850	11,705

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

Figure 7 Number of sales and valuations, 12 months

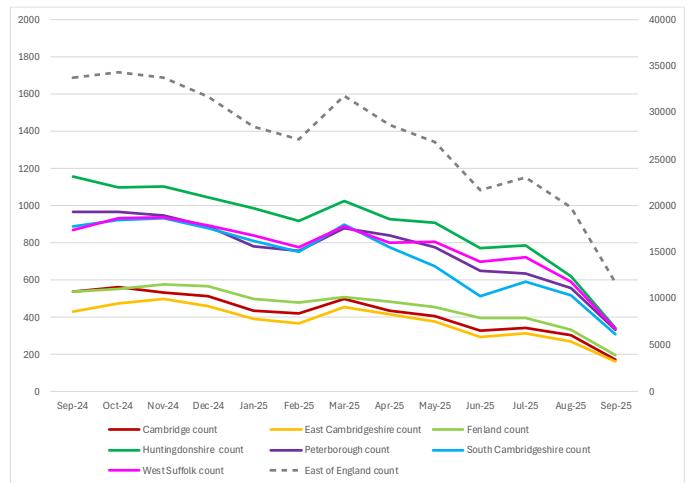
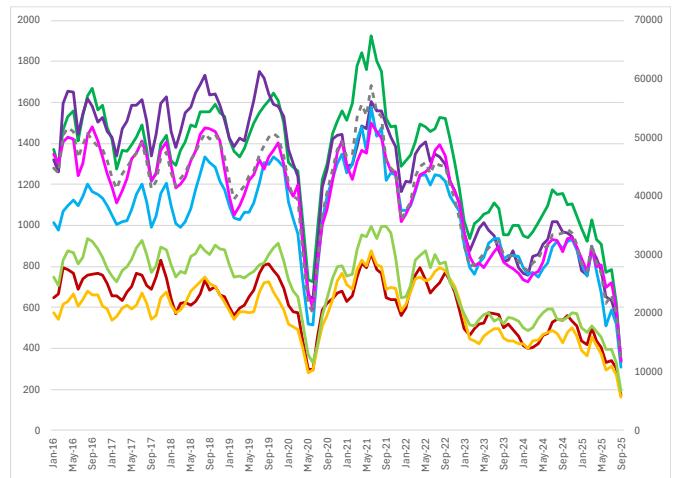


Figure 8 Number of sales and valuations, 9 years



Median price of sales + valuations

This page shows...

- 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 68!
- 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 2** shows median property prices every month over the past 12 months (Sept 2024 to Sept 2025).



Key

Cambridge	East Cambridgeshire	Fenland
Peterborough	South Cambridgeshire	West Suffolk
Huntingdonshire		
East of England		

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 (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 (grey dashed).
- Figure 11** shows a similar trend line across the districts and the region, over the past 9 years.
- Table 2** shows some small rises and falls in median price over the past 12 months.
- Comparing Sept 2024 and Sept 2025, six areas have seen a drop in median price and two areas have seen a rise; namely East Cambridgeshire and West Suffolk.
- Arrows have been added in the last column, comparing the Sept 2024 to the Sept 2025 values.

Figure 9 Median price, district level

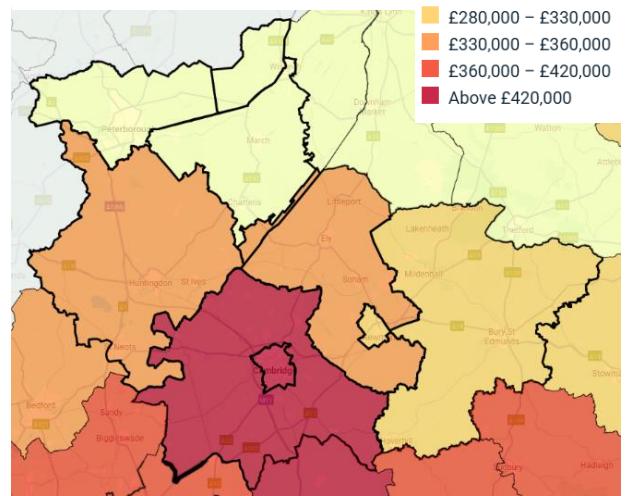


Figure 10 Median price based on sales + valuations, 12 mths

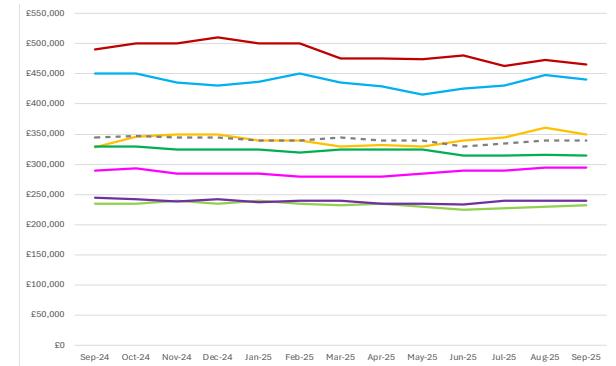


Figure 11 Median price based on sales + valuations, 9 years

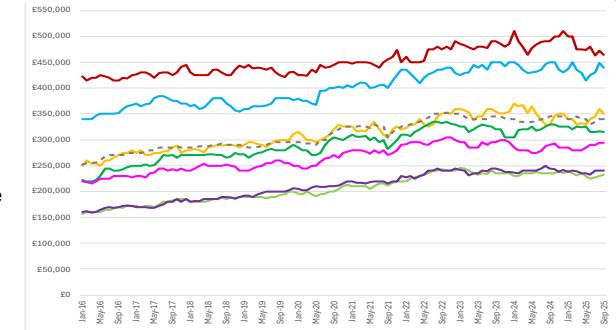


Table 2. Median price based on sales + valuations (£)

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	£490,000	£500,000	£500,000	£510,000	£500,005	£500,000	£475,000	£475,000	£474,004	£480,000	£462,500	£472,500	£465,000
ECDC	£328,000	£346,000	£350,000	£350,000	£340,000	£340,000	£330,000	£332,000	£329,000	£340,000	£345,000	£360,000	£350,000
Fenland	£235,000	£235,000	£240,000	£235,000	£239,998	£235,000	£231,750	£235,000	£230,165	£225,000	£227,500	£230,000	£232,500
HDC	£330,000	£330,000	£325,000	£325,000	£325,000	£320,000	£325,000	£324,000	£325,000	£315,000	£315,000	£316,000	£315,000
Peterboro'	£245,000	£242,500	£238,000	£242,000	£237,500	£240,000	£239,000	£235,000	£235,000	£233,000	£240,000	£240,000	£240,000
SCDC	£450,000	£450,000	£435,000	£430,000	£436,500	£450,000	£435,000	£428,875	£415,000	£425,500	£430,000	£448,500	£440,000
WSuffolk	£290,000	£293,250	£285,000	£285,000	£284,475	£280,000	£280,000	£280,000	£285,000	£290,000	£290,000	£294,000	£294,500
EoEngland	£345,000	£347,000	£345,000	£345,000	£340,000	£340,000	£345,000	£340,000	£340,000	£330,000	£335,000	£340,000	£340,000

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

New page!

Number compared to price of sales + valuations

This page shows...

For the first time we can look at the trend in the number of sales and valuations, compared to the price of sales and valuations.

The same process is repeated for sales only on page 10.

The aim is to see whether there is a discernible link between the number of sales and their prices, in each district.

- Each graph brings together data from page 5 (number of sales + valuations) and 6 (median price of sales + valuations).
- The left hand axis sets out the prices (represented by the solid lines), the maximum being set to £550,000 so we can compare one area to another visually.
- The right hand axis relates to the number of sales and valuations (represented by the dotted lines) with a maximum value of 2,000 for every graph, again to aid comparison.
- Although the horizontal time scale is only labelled to July 2025, in fact the data actually covers up to Sept 2025 (same as pages 5 and 6)

Notes & observations

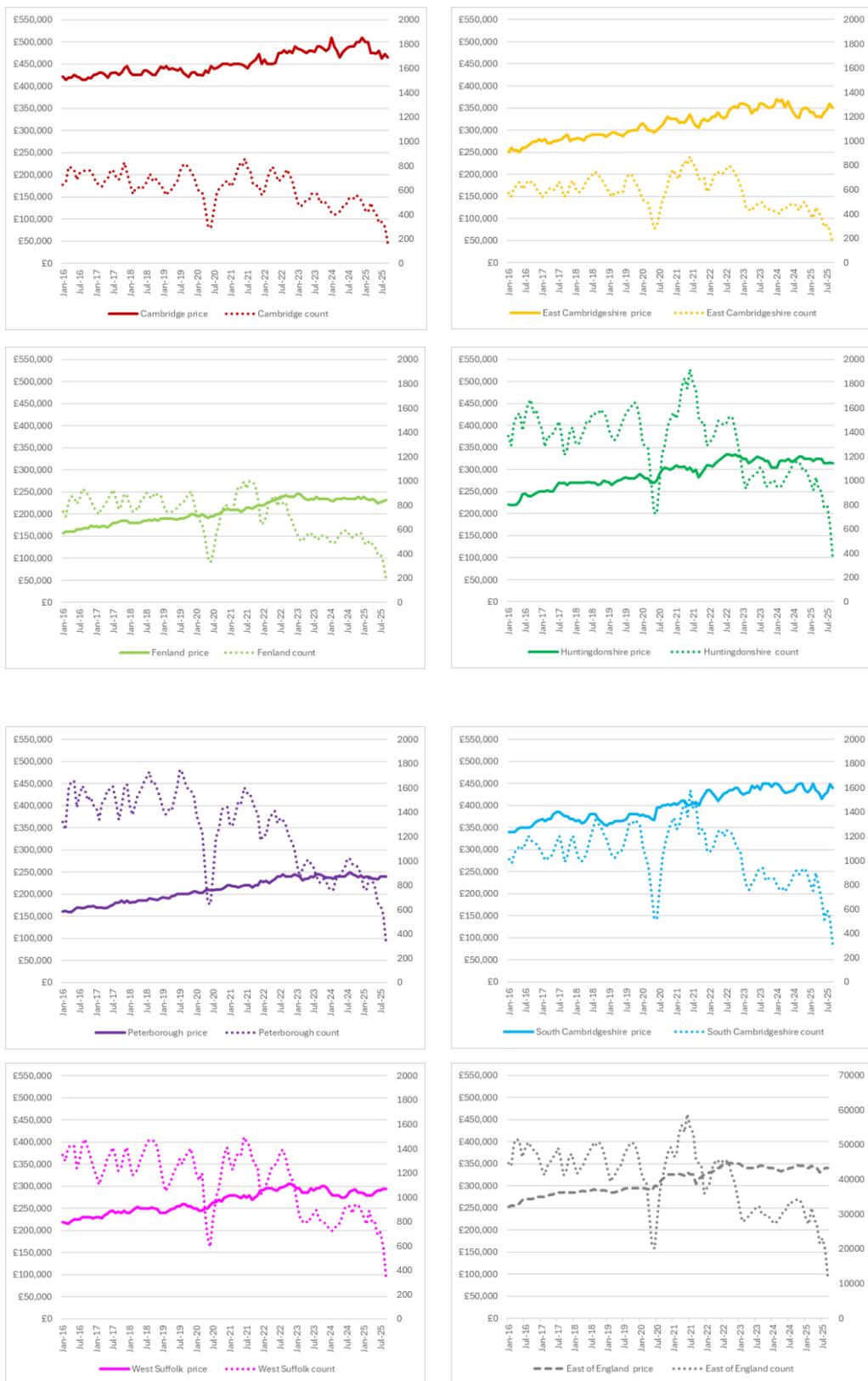
- All districts see a significant drop in the number of sales and valuations at around July 2020, and in the last 6 months (which usually relates to the data "coming through" the system, and recovers in time).
- The number of sales and valuations fluctuates a lot more than prices!
- Prices to my eye seem remarkably steady. There are small fluctuations but no "big rises" or "big drops". All the price trend lines are showing a gentle increase, as might have been imagined.
- Visually it is hard to see a relationship between the 2 lines. However it would be worth doing some more statistical analysis of the data in future, to see if there is what's known as a "causal" relationship, now the data is available to us!

Data sources:

Set out on pages 5 and 6.

Key  Cambridge  East Cambridgeshire  Fenland  Huntingdonshire
 Peterborough  South Cambridgeshire  West Suffolk  East of England

Figure 12 Number of, and median price of, sales + valuations for each area, 9 years



Number of sales excluding valuations

This page shows...

This page shows the number of “real” 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 13](#) shows the total number of actual sales across the East of England and our group of districts.
- [① 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 2,000 sales) while the scale on the right shows the number of sales across the region (the grey dashed line) – going up to 25,000 sales. [Figure 13](#) looks at the last 12 months of data.
- [Figure 14](#) shows the same data over the last 9 years.
- [Table 3](#) sets out the number of “real” sales for each district and the region, over the past 12 months (Sept 2024 to Sept 2025).

Notes & observations

- [Figure 13](#) shows a similar trend to [Figure 7](#) (on page 5). There is a marked drop in sales around Jan/Feb 2025, an increase to March, and since March the numbers fall away to a low point in September. As previously discussed, the drop will be partly due to the time to process sales numbers. In the past the number of sales levelled up once the data was processed.
- In [Table 3](#) we can see exactly how small a number of sales we are looking at, as reported in the September 2025 data – ranging from 26 in Cambridge to 62 in Huntingdonshire, whereas at September 2024 there were 323 sales in Cambridge and 757 in Huntingdonshire.

① Notes

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 3. Number of actual sales

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	323	337	297	286	243	237	292	242	204	118	111	75	26
ECDC	292	318	319	294	250	220	291	240	206	126	132	85	32
Fenland	340	346	360	385	343	316	314	274	251	197	187	110	38
HDC	757	695	678	654	630	574	657	562	521	376	358	212	62
Peterboro'	599	604	561	532	450	425	512	469	436	326	298	167	52
SCDC	557	574	563	553	500	462	580	477	383	226	236	171	63
WSuffolk	586	617	600	594	565	515	573	470	460	348	356	220	86
EoEngland	21,956	22,024	20,845	20,039	17,744	16,760	20,252	17,146	15,034	9,678	9,911	6,220	2,235

Data Source	Series	Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
HMLand Registry (England & Wales)		Jan 2016 – Sept 2025	Monthly	Oct 2025	Region/LA/Postcode Area	Calculated over a 3-month rolling window

Key

Cambridge	East Cambridgeshire	Fenland	Huntingdonshire
Peterborough	South Cambridgeshire	West Suffolk	East of England

Figure 13 Number of sales excluding valuations, 12 months

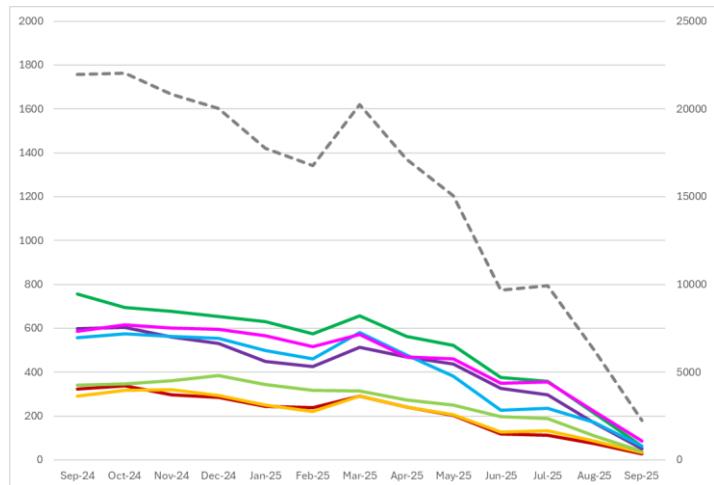
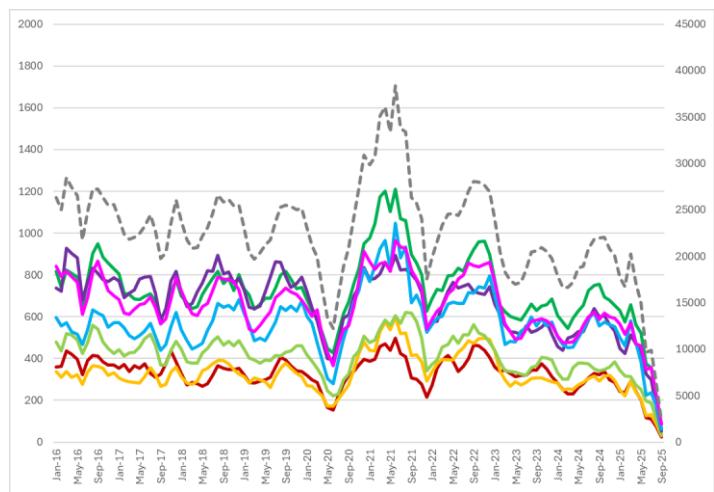


Figure 14 Number of sales excluding valuations, 9 years



Median price of sales excluding valuations



This page shows...

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 15](#) 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 16](#) sets out the same data, looking back over the past 9 years.
- [Table 4](#) shows median property prices based on actual sales only from Sept 2024 to Sept 2025.

Notes & observations

- The median price based on sales only looks reasonably steady for each district, and across the region, looking at [Figure 15](#). There is a rise to around December 2024, then a drop leading to around July 2025, followed by an increase to the latest data in September 2025.
- [Figure 16](#) shows 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 4](#) shows the lowest median price based on sales only in September 2025 was £225,500 in Fenland, and the highest was £493,750 in Cambridge.
- Using [Table 4](#) to compare Sept 2024 and Sept 2025, all areas except Cambridge have seen a drop in median price based on sales only. Cambridge saw an increase from £487,000 in Sept 2024 to £493,750 in Sept 2025. The rises and falls, comparing to a year ago, are highlighted by the arrows in the final column of the table.
- On page 11, 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 15 Median price based on ‘real’ sales only, 12 months

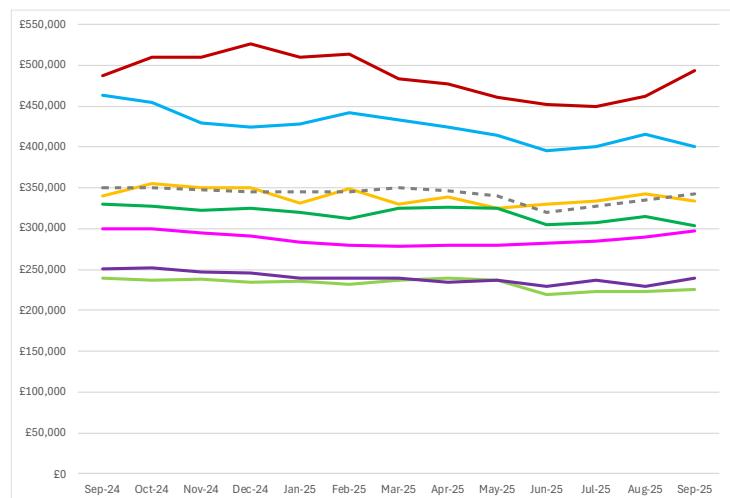
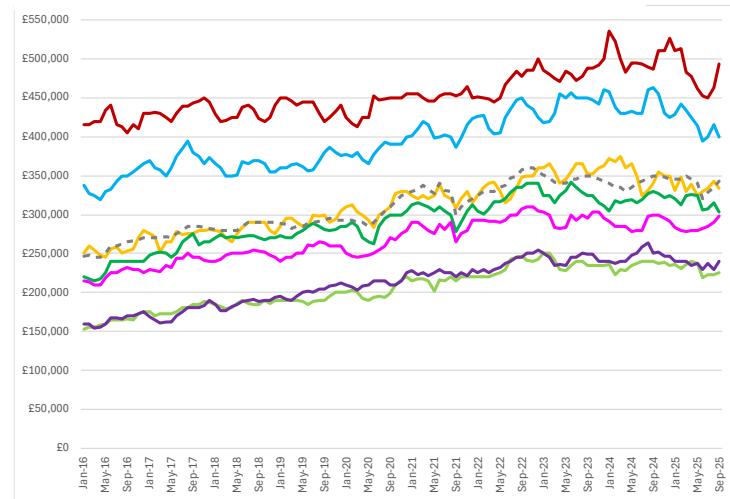


Figure 16 Median price of actual sales, 9 years



Key

Cambridge	East Cambridgeshire	Fenland
Peterborough	South Cambridgeshire	West Suffolk
Huntingdonshire	Huntingdonshire	
	East of England	

Table 4. Median price based on sales only (£)

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	£487,000	£510,000	£510,000	£526,250	£510,000	£513,500	£483,100	£477,500	£461,500	£452,500	£450,000	£462,500	£493,750↑
EDDC	£340,000	£355,000	£350,000	£350,000	£331,000	£348,500	£330,000	£338,750	£325,000	£330,000	£333,750	£342,500	£333,750↓
FDC	£240,000	£237,250	£238,213	£235,000	£236,000	£231,375	£236,500	£240,000	£237,500	£219,000	£223,000	£223,000	£225,500↓
HDC	£330,000	£327,000	£322,000	£325,000	£320,000	£312,750	£325,000	£325,750	£325,000	£305,500	£307,000	£315,000	£303,500↓
Peterbord	£251,000	£252,000	£247,000	£246,450	£240,000	£240,000	£239,500	£235,000	£237,000	£230,000	£237,500	£230,000	£240,000↓
SODC	£463,000	£455,000	£430,000	£425,000	£428,750	£441,498	£433,750	£425,000	£414,000	£395,000	£400,250	£416,000	£400,000↓
WSuffolk	£300,000	£300,000	£295,000	£291,000	£284,000	£280,000	£278,000	£280,000	£280,000	£282,250	£285,000	£290,000	£297,500↓
E of Eng	£350,000	£350,000	£348,000	£345,000	£345,000	£345,000	£350,000	£346,000	£340,000	£320,000	£328,000	£335,000	£342,500↓

Data Source	Series	Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
HMLand Registry (England & Wales)		Jan 2016 – Sept 2025	Monthly	Oct 2025	Region/LA/Postcode Area	Calculated over a 3-month rolling window

New page!

Number compared to price of sales only

This page shows...

For the first time we can look at the trend in the number of sales and valuations, compared to the price of sales and valuations over the past 9 years.

This repeats the same graphs as found on page 7, which includes both sales and valuations data.

The aim is to see whether there is a discernible link between the number of sales and their prices, in each district.

- Each graph brings together data from page 5 (number) and 6 (price).
- The left hand axis sets out the prices (solid lines), the maximum being set to £550,000 so we can compare one area to another visually.
- The right hand axis relates to the number of sales and valuations (dotted lines), but because the number of real sales vary so much, the height of the right hand axis has this time been set in line with that district's value of sales. This enables us to more easily spot if there is a link between number of sales and the prices achieved.
- Although the horizontal time scale is only labelled to Aug 2025, in fact the data and the lines go to Sept 2025 (same as pages 5 and 6)

Notes & observations

- All districts see a significant drop in the number of sales and valuations at around Aug 2020, and in the last 6 months (which usually relates to the data "coming through" the system, and recovers in time).
- The number of sales and valuations fluctuates a lot more than prices!

- There are small fluctuations but no "big rises" or "big drops". All the price trend lines are showing a gentle increase, as might have been imagined.
- Visually it is hard to see a relationship between the 2 lines. However it would be worth doing some more statistical analysis of the data in future, to see if there is what's known as a "causal" relationship, now the data is available to us!

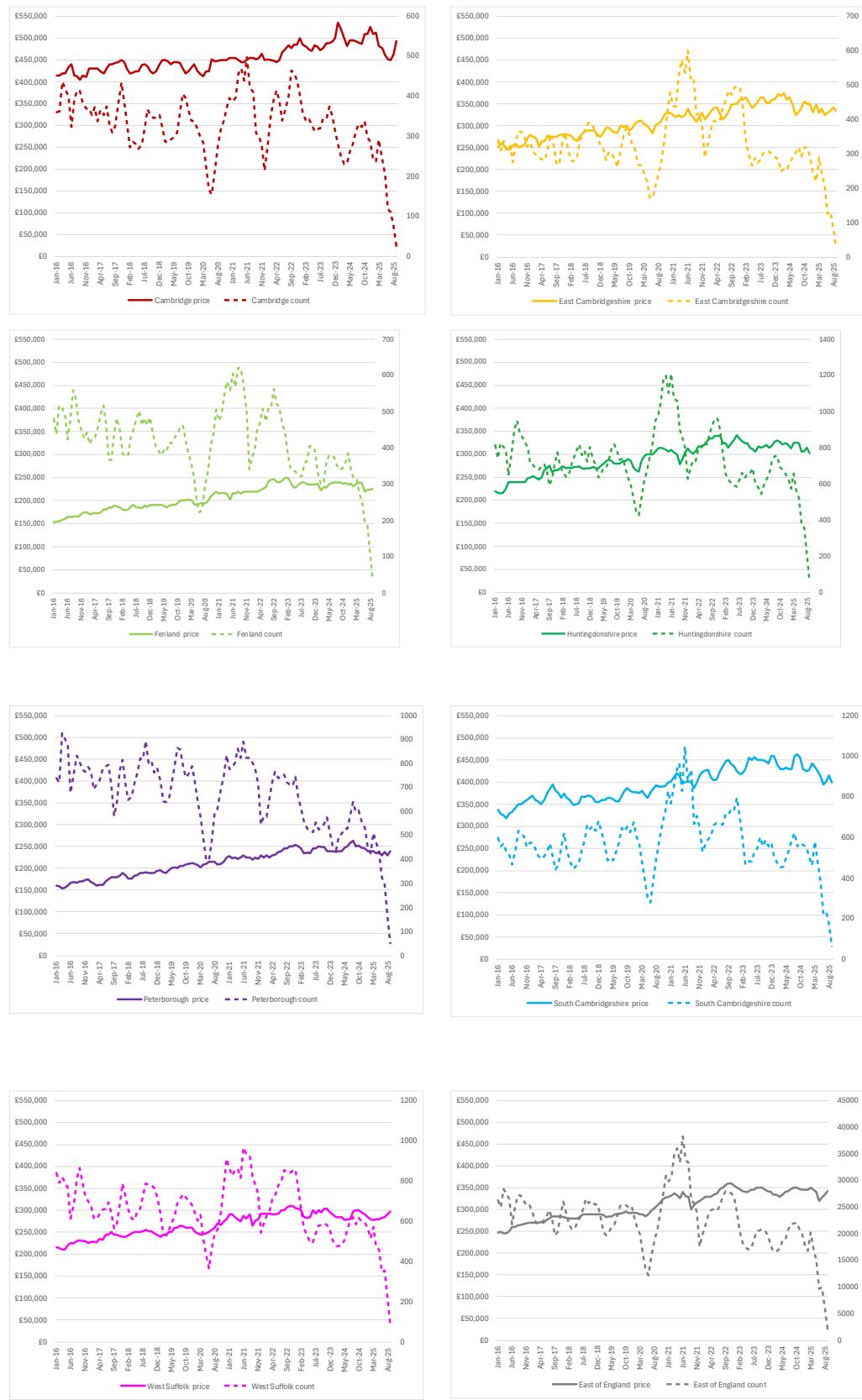
Data sources

Set out on pages 8 and 9.

Key

Cambridge	East Cambridgeshire	Fenland	Huntingdonshire
Peterborough	South Cambridgeshire	West Suffolk	East of England

Figure 17 Number of, and median price of, sales excluding valuations for each area, 9 years



Median price of 'real' sales vs price based on sales + valuations

This page shows...

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 18 sets out the median price based on sales only (solid lines) and the median price based on sales + valuations (dotted lines), over the past 9 years.

Notes & observations

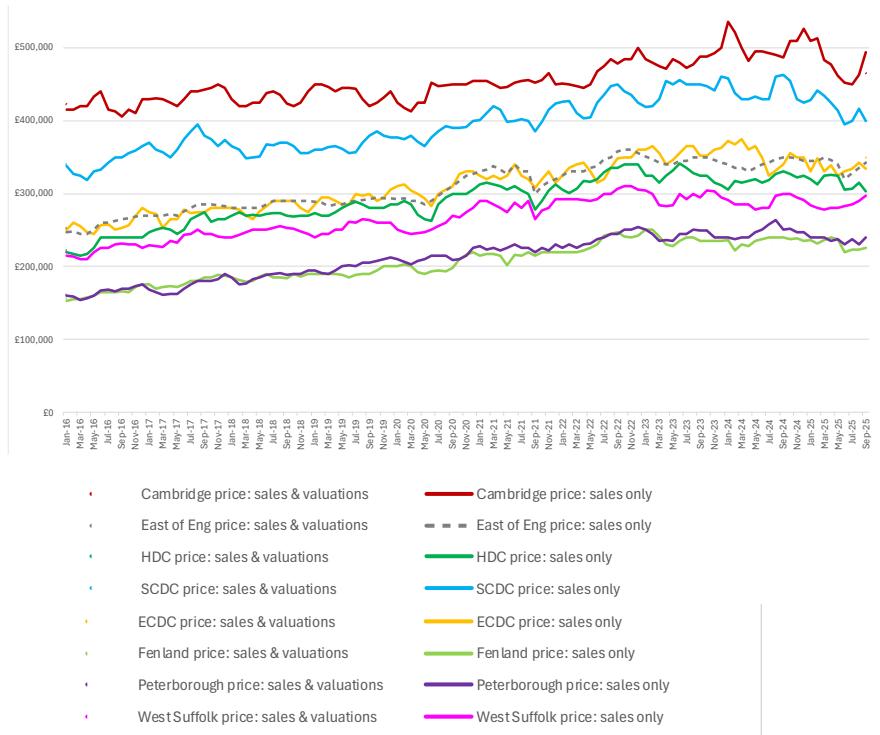
- **Figure 18** shows data trends over the past 9 years. This, in my mind, highlights how closely the two lines run for each area covered.
- There are some differences, but in general, the lines run fairly close, so using median price based on sales + valuations, or median price based on real sales only, 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. When 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 5** sets the data used for this comparison. Of the 104 values in the table, 40 show the sales and valuation price being below the sales only price. This accounts for 38% of the values – so there is no very clear or consistent pattern of which data set shows a higher or a lower value over the patch as 38% are "one way" and 62% are the other. The lower value is shaded pale grey.

Table 5. Comparing median price, using sales vs sales + valuations

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge													
Sales	£487,000	£510,000	£510,000	£526,250	£510,000	£513,500	£483,100	£477,500	£461,500	£452,500	£450,000	£462,500	£493,750
S+V	£490,000	£500,000	£500,000	£510,000	£500,005	£500,000	£475,000	£475,000	£474,004	£480,000	£462,500	£472,500	£465,000
East Cambridgeshire													
Sales	£340,000	£355,000	£350,000	£350,000	£331,000	£348,500	£330,000	£338,750	£325,000	£330,000	£333,750	£342,500	£333,750
S+V	£328,000	£346,000	£350,000	£350,000	£340,000	£340,000	£330,000	£332,000	£329,000	£340,000	£345,000	£360,000	£350,000
Fenland													
Sales	£240,000	£237,250	£238,213	£235,000	£236,000	£231,375	£236,500	£240,000	£237,500	£219,000	£223,000	£223,000	£225,500
S+V	£235,000	£235,000	£240,000	£235,000	£239,998	£235,000	£231,750	£235,000	£230,165	£225,000	£227,500	£230,000	£232,500
Huntingdonshire													
Sales	£330,000	£327,000	£322,000	£325,000	£320,000	£312,750	£325,000	£325,750	£325,000	£305,500	£307,000	£315,000	£303,500
S+V	£330,000	£330,000	£325,000	£325,000	£325,000	£320,000	£325,000	£324,000	£325,000	£315,000	£315,000	£316,000	£315,000
Peterborough													
Sales	£251,000	£252,000	£247,000	£246,450	£240,000	£240,000	£239,500	£235,000	£237,000	£230,000	£237,500	£230,000	£240,000
S+V	£245,000	£242,500	£238,000	£242,000	£237,500	£240,000	£239,000	£235,000	£235,000	£233,000	£240,000	£240,000	£240,000
South Cambridgeshire													
Sales	£463,000	£455,000	£430,000	£425,000	£428,750	£441,498	£433,750	£425,000	£414,000	£395,000	£400,250	£416,000	£400,000
S+V	£450,000	£450,000	£435,000	£430,000	£436,500	£450,000	£435,000	£428,875	£415,000	£425,500	£430,000	£448,500	£440,000
West Suffolk													
Sales	£300,000	£300,000	£295,000	£291,000	£284,000	£280,000	£278,000	£280,000	£280,000	£282,250	£285,000	£290,000	£297,500
S+V	£290,000	£293,250	£285,000	£285,000	£284,475	£280,000	£280,000	£285,000	£290,000	£290,000	£294,000	£294,500	
East of England													
Sales	£350,000	£350,000	£348,000	£345,000	£345,000	£345,000	£350,000	£346,000	£340,000	£320,000	£328,000	£335,000	£342,500
S+V	£345,000	£347,000	£345,000	£345,000	£340,000	£340,000	£345,000	£340,000	£330,000	£335,000	£340,000	£340,000	

Data sources for Table 5 are set out on pages 6 and 8.

Figure 18 Median price based on sales vs sales + valuations, 9 years



Lower Quartile price

This page shows...

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 19](#) shows lower quartile prices for each district (solid lines) and the East of England region (grey dashes) over the past 12 months.
- [Figure 20](#) shows the same data over the past 9 years.
- [Table 6](#) shows lower quartile prices every month over the past 12 months (Sept 2024 to Sept 2025).

Notes & observations

- [Figure 19](#) shows a fairly similar pattern, and steady lines overall, across our districts and the region.
- [Figure 20](#) shows the longer term trend of 9 years, each district seeing "ups and downs" but following a reasonably consistent line.
- [Table 6](#) shows that in Sept 2025, lower quartile prices ranged from £190,000 in Peterborough to £350,000 in Cambridge.
- An arrow has been added in the last column, showing whether the LQ price has increased or decreased overall since Sept 2024.
- Comparing Sept 2025 to Sept 2024, lower quartile prices have increased in two areas (meaning the bottom end of the market is becoming less affordable) and decreased in five areas (the bottom end of the market is becoming more affordable). The decreases were seen in Cambridge, Fenland, Huntingdonshire, Peterborough and South Cambs. The regional LQ held steady overall.

① 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 6. Lower quartile price based on sales + valuations (£)

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cam	£370,003	£375,000	£375,000	£385,000	£385,275	£380,000	£375,000	£360,000	£368,875	£370,000	£365,316	£365,000	£350,000 ↓
ECC	£255,000	£264,375	£250,000	£260,000	£260,000	£265,000	£260,000	£265,000	£260,000	£252,000	£266,250	£277,500	£282,750 ↑
FDC	£190,000	£190,000	£190,000	£186,000	£180,000	£189,000	£190,000	£193,125	£186,750	£180,500	£182,000	£187,375	£197,500 ↓
HDC	£255,000	£256,875	£252,000	£250,000	£249,995	£240,750	£250,000	£250,000	£248,000	£240,000	£241,000	£245,000	£240,000 ↓
Petb	£190,500	£190,000	£188,050	£190,000	£190,250	£194,000	£190,000	£190,000	£185,000	£192,000	£190,000	£190,000	£190,000 ↓
SOC	£350,000	£348,000	£335,000	£331,125	£335,000	£341,000	£340,000	£335,000	£324,000	£320,000	£325,000	£330,000	£337,500 ↓
WSuf	£230,000	£234,000	£232,000	£234,996	£230,000	£228,000	£227,500	£229,000	£232,500	£232,500	£235,000	£238,000	£245,000 ↑
EoE	£250,000	£250,000	£250,000	£250,000	£250,000	£250,000	£253,000	£250,000	£250,000	£241,000	£248,000	£250,000	£250,000 →

Figure 19 Change in lower quartile price, 12 months

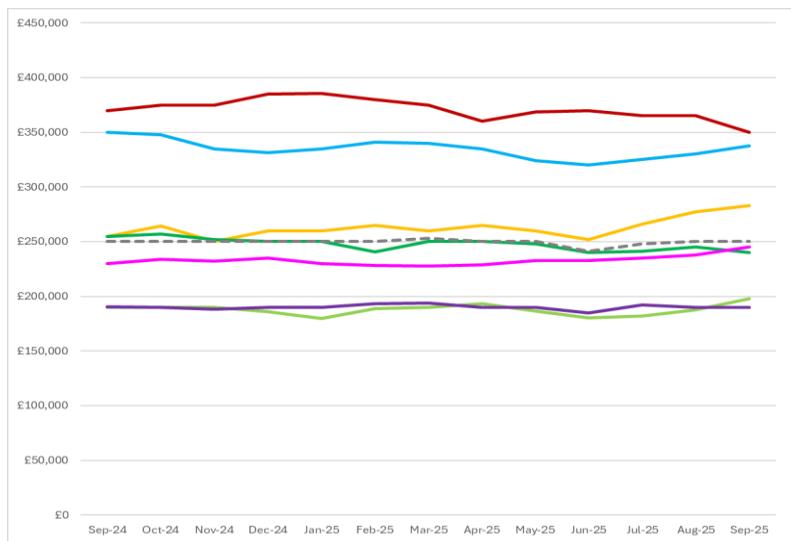
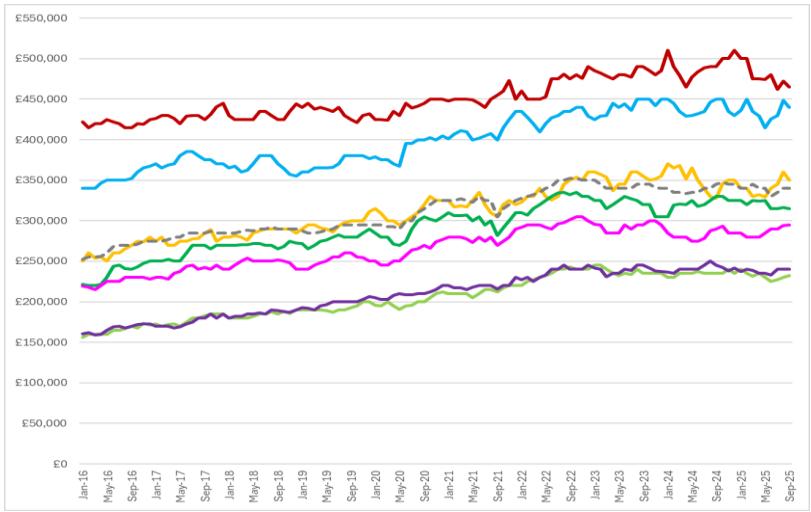


Figure 20 Change in lower quartile price, 9 years



Key

Cambridge	East Cambridgeshire	Fenland	Huntingdonshire
Peterborough	South Cambridgeshire	West Suffolk	East of England

Price per m²

This page shows...

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

- [Figure 21](#) 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 22](#) shows the same data over the past 9 years (Jan 2016 to Sept 2025)
- [Table 7](#) shows price per square metre values for each month, from Sept 2024 to Sept 2025.

① 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.

Notes & observations

- [Figure 21](#) shows trendlines for all areas, which look fairly level over the past 12 months.
- [Figure 22](#) 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 shape of the East of England line.
- [Table 7](#) shows the values for each district, ranging from £2,314 in Fenland to £5,000 in Cambridge.
- Comparing Sept 2024 and Sept 2025, average prices per sq m increased in 5 districts and the region, and decreased in 3 districts – however many of the changes are relatively small.



Figure 21 Median sold & valuation price per square metre, 12 months

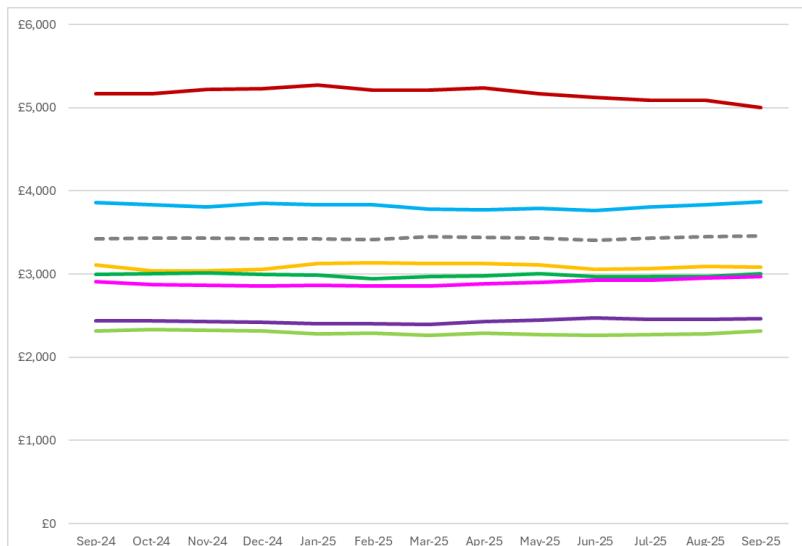


Figure 22 Median sold & valuation price per square metre, 9 years

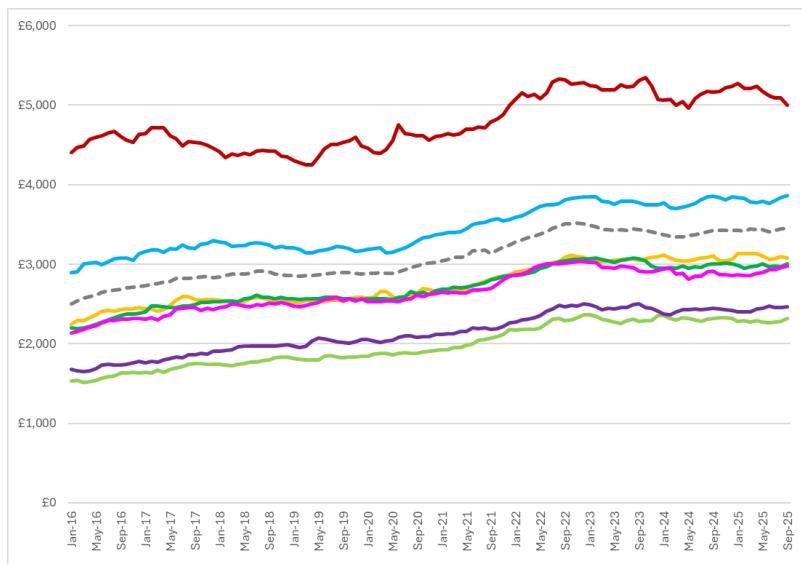


Table 7. Median sold and valuation price per sq metre (£)

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	5,166	5,169	5,221	5,233	5,272	5,208	5,208	5,237	5,172	5,122	5,091	5,091	5,000 ↓
ECDC	3,107	3,044	3,044	3,057	3,131	3,135	3,132	3,132	3,106	3,058	3,068	3,097	3,081 ↓
Fenland	2,320	2,330	2,325	2,320	2,280	2,290	2,268	2,289	2,271	2,262	2,275	2,283	2,314 ↓
HDC	3,000	3,007	3,015	3,000	2,985	2,948	2,972	2,976	3,009	2,970	2,973	2,972	3,004 ↑
Peterboro'	2,443	2,439	2,427	2,423	2,402	2,402	2,399	2,434	2,448	2,470	2,456	2,457	2,462 ↑
SCDC	3,860	3,837	3,812	3,849	3,836	3,832	3,786	3,771	3,789	3,766	3,804	3,835	3,867 ↑
WSuffolk	2,911	2,871	2,869	2,857	2,869	2,859	2,857	2,881	2,897	2,927	2,930	2,955	2,973 ↑
EoEngland	3,423	3,429	3,429	3,421	3,421	3,416	3,448	3,439	3,433	3,409	3,429	3,448	3,457 ↑

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

Key

Cambridge	East Cambridgeshire	Fenland	Huntingdonshire
Peterborough	South Cambridgeshire	West Suffolk	East of England

Average time taken to sell

This page shows...

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

- [Figure 23](#) shows average time to sell in weeks, for each district (solid lines) and the East of England region (grey dashes) from Feb 2019 to September 2025 (though the scale shows August, that is just because of formatting).
- [Figure 24](#) shows the sample size i.e. number of sales used to calculate average time.
- [Table 8](#) shows the average time take to sell in days, between Sept 2024 and Sept 2025
- [Table 9](#) shows the size of the sample which drives the time taken to sell calculation.



Notes & observations

- [Figure 23](#) 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.
- [Figure 24](#) helps visualize the number of sales being used to calculate the average time taken to sell.
- At Sept 2025, [Table 8](#) shows East Cambridgeshire and Fenland having the slowest times to sell at 46 and 48 days respectively. Huntingdonshire and West Suffolk saw the shortest time to sell at 37 days.
- Comparing Sept 2024 and Sept 2025, overall six areas saw an increase in the time to sell and 2 saw a decrease.

Key

Cambridge	East Cambridgeshire	Fenland	Huntingdonshire
Peterborough	South Cambridgeshire	West Suffolk	East of England

① **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 calculation uses 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.

Table 8. Average time taken to sell (days)

	Sep-24	Oct-24	Nov-24	Dec-25	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	28	29	30	33	35	35	33	32	33	32	32	34	38 ↑
ECDC	38	38	37	40	43	42	42	42	45	47	42	42	46 ↑
Fenland	43	42	44	45	48	50	52	50	49	47	45	47	48 ↑
HDC	40	40	39	41	44	41	36	36	36	35	35	36	37 ↓
Peterboro'	37	39	41	42	43	42	42	40	39	38	38	41	42 ↑
SCDC	39	38	38	39	40	40	38	38	37	37	38	37	38 ↓
WSuffolk	34	36	36	36	36	34	31	30	31	32	32	33	37 ↑
EoEngland	38	37	39	41	46	40	35	31	33	35	38	40	41 ↑

Table 9. Sample size for time to sell (days)

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	679	704	657	633	601	610	614	583	625	681	718	708	660
ECDC	453	480	430	409	411	429	419	394	422	442	437	418	408
Fenland	462	470	442	417	411	419	433	412	427	460	483	484	463
HDC	676	672	619	577	572	598	638	642	689	742	784	755	728
Peterboro'	966	962	946	918	863	856	874	890	915	941	961	933	865
SCDC	1,138	1,131	1,073	997	910	885	883	894	933	971	1,057	1,037	1,001
WSuffolk	707	712	657	618	614	635	629	658	710	790	816	789	758
EoEngland	16,580	16,821	16,463	14,111	13,175	13,767	16,629	17,434	17,943	18,001	18,366	17,294	15,664

Figure 23 Change in average time taken to sell (days)

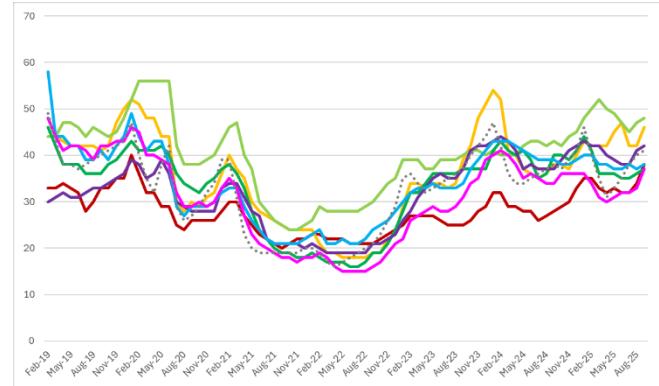
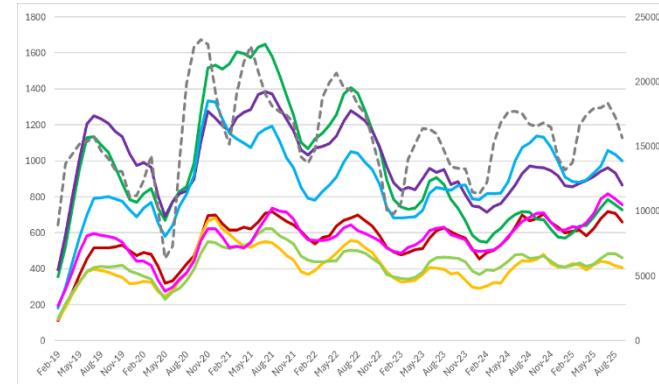


Figure 24 Sample size for time taken to sell (days)



% of asking price achieved

This page shows...

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

- Figure 25 shows the change in the proportion of the asking price which is achieved at the point of sale, for each district (solid lines) and the region (grey dashes). This provides data from December 2023 to September 2025.
- Table 10 shows the percentage of the asking price which is achieved every month from Sept 2024 to Sept 2025. For the first time in Edition 66 we included data on the sample size used to calculate the % asking price achieved, and we have repeated that in Edition 67.

Notes & observations

- Figure 25 shows the highest proportion of asking price achieved in Cambridge.
- 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.
- Table 10 shows the percentage as 98.4% at Sept 2025. At the other end of the scale, the lowest percentage of asking price achieved was seen in Fenland at 94.2%, followed by Peterborough at 95.8%. East of England saw 96.8% of asking prices achieved at Sept '25.

① Note on 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 10. Percentage of asking price achieved

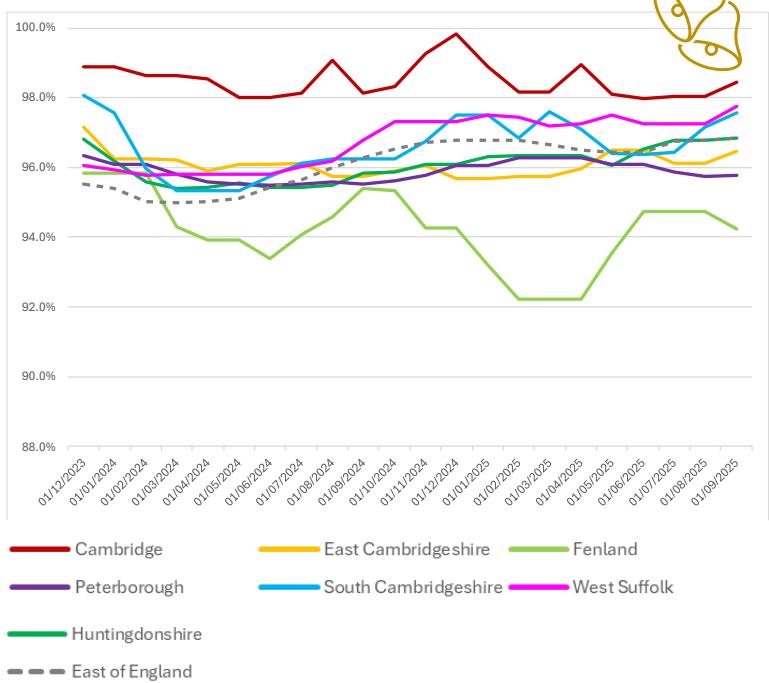
	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	98.1%	98.3%	99.3%	99.8%	98.9%	98.2%	98.2%	98.9%	98.1%	98.0%	98.0%	98.0%	98.4%
ECDC	95.8%	95.9%	96.1%	95.7%	95.7%	95.7%	95.7%	96.0%	96.5%	96.5%	96.1%	96.1%	96.5%
Fenland	95.4%	95.3%	94.3%	94.3%	93.2%	92.2%	92.2%	92.2%	93.5%	94.7%	94.7%	94.7%	94.2%
HDC	95.8%	95.9%	96.1%	96.1%	96.3%	96.3%	96.3%	96.3%	96.1%	96.5%	96.8%	96.8%	96.8%
Peterboro'	95.5%	95.6%	95.8%	96.1%	96.1%	96.3%	96.3%	96.3%	96.1%	96.1%	95.9%	95.7%	95.8%
SCDC	96.3%	96.3%	96.7%	97.5%	97.5%	96.8%	97.6%	97.1%	96.4%	96.4%	96.4%	97.2%	97.6%
WSuffolk	96.8%	97.3%	97.3%	97.3%	97.5%	97.4%	97.2%	97.2%	97.5%	97.2%	97.2%	97.2%	97.7%
EoEngland	96.3%	96.5%	96.7%	96.8%	96.8%	96.8%	96.7%	96.7%	96.4%	96.4%	96.7%	96.8%	96.8%

Table 11. Sample size for percentage of asking price achieved

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Cambridge	217	237	236	237	212	181	212	175	164	142	135	129	73
ECDC	116	139	149	143	147	153	178	148	131	131	121	111	72
Fenland	115	124	119	128	128	128	139	119	119	104	91	87	62
HDC	319	331	347	338	317	291	306	268	239	229	223	211	165
Peterboro'	255	287	313	319	312	304	334	290	264	240	239	216	163
SCDC	270	301	331	303	312	306	353	298	255	251	226	214	131
WSuffolk	233	252	257	271	283	275	275	245	214	186	173	175	141
EoEngland	5,621	5,876	5,810	5,627	4,936	4,609	5,926	4,986	4,130	2,226	2,842	3,190	2,711

Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Rolling Period
Zoopla/HMLR (England & Wales),	Dec 2023 – Sept 2025	Monthly	Oct 2025	Region	3 month rolling window
Zoopla/HMLR (England & Wales),	Dec 2023 – Sept 2025	Monthly	Oct 2025	LA/ Postcode Area	6 month rolling window

Figure 25 % asking price achieved



Private rents & Local Housing Allowance



This page shows...

- **Figure 26** shows median monthly private rents across our area, at district level. We hope in future editions to share more detailed maps.
- **Figure 27** sets out the median private rent in each district, by property size /type. In this edition, the breakdown covers
 - 1 bed flat
 - 2 bed flat
 - 2 bed house
 - 3 bed house
 - 4+ bed house
- **Table 12** 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 an approximate comparison. Local Housing Allowance rates are set by the Valuation Office Agency based on a survey of their own (not Hometrack) data.
- **Figure 30** 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](#).
- For more detail on local housing allowances and broad rental market areas, please visit www.voa.gov.uk.
- **Table 13** sets out the sample size used for private rents, which 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.

Notes & observations

- **Figure 26** 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 27** shows the median rent by property size / type. This shows a similar pattern of rent levels as outlined on the map. The values used in **Figure 27** are set out in **Table 12**.
- **① Please note in Table 12**, the colour of the title rows in the final column showing the main LHA rate relates to shading on the map at **Figure 30**.
- **Figure 28** shows the change in the overall median rent, by district, over the past nine years. There is clearly an increase over time which seems to have accelerated since around July 2022 in all areas.
- **Figure 29** shows the sample size used for the median rent figures, which show some similarities and some differences between the districts. A line is included for the Region, which has been plotted on the right hand axis as the numbers of rents across the Region (totalling up to 80,000) is huge, compared to the numbers for our local districts which reach a maximum of just over 4,000.
- In many of our areas, and the region, there seems to be a climb in number up to Jan 2020, then a decline to Jan 2021 followed for many by a reasonably steady line to July 2024, then a drop and a rise to Sept 2025. Huntingdonshire's line differs, dropping right away between July 2023 and Sept 2025.

Key

Cambridge	East Cambridgeshire	Fenland
Peterborough	South Cambridgeshire	West Suffolk
Huntingdonshire		
— — — East of England		

Figure 26 Median monthly private rent asking price (per district)

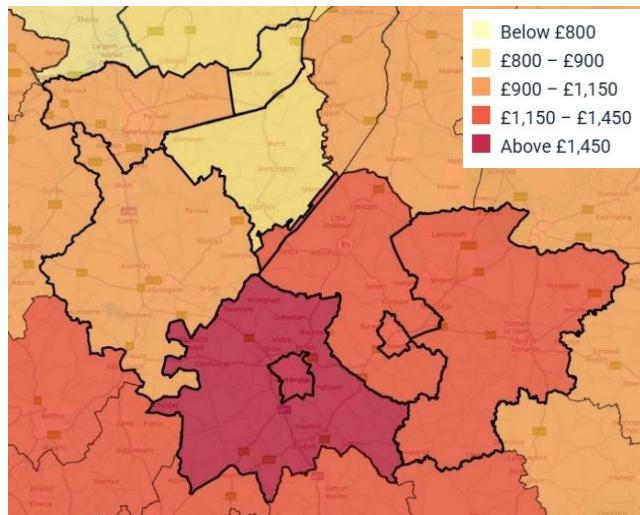


Figure 27 Median rent by size for each district, end of Sept 2025

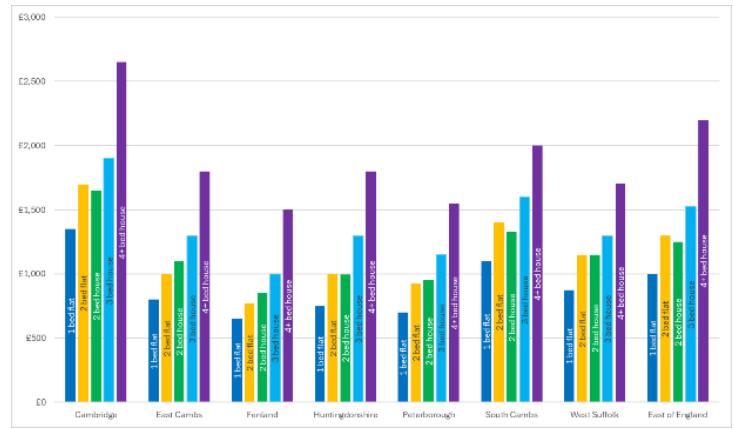


Figure 28 Change in median rent, 9 years to Sept '25

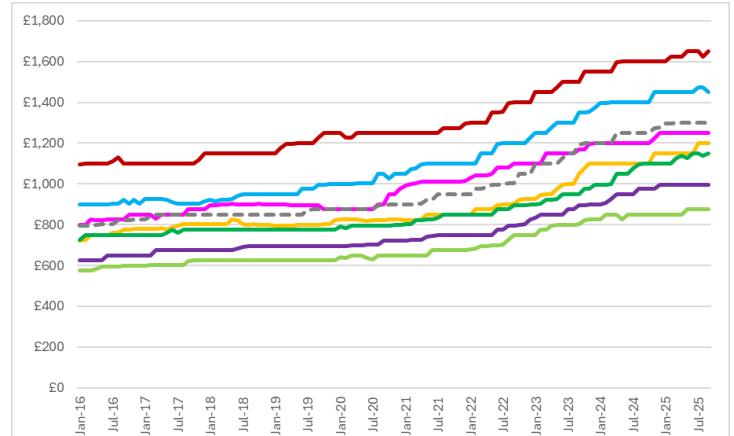


Figure 29 Sample used for median rent, 9 years to Sept '25

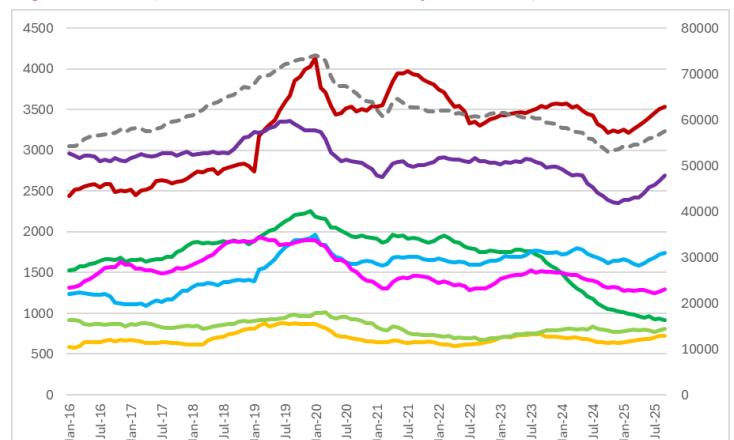


Table 12. Median rental asking price by district (monthly over a year) and the major LHA rate for that area. Bold = LHA exceeds latest rent

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Rounded LHA rate
Cambridge													Cambridge BRMA	
1 bed flat	£1,343	£1,350	£1,334	£1,350	£1,326	£1,326	£1,350	£1,350	£1,350	£1,350	£1,350	£1,350	£1,350	£898
2 bed flat	£1,651	£1,651	£1,677	£1,695	£1,698	£1,698	£1,698	£1,700	£1,700	£1,699	£1,698	£1,698	£1,698	£947
2 bed hse	£1,650	£1,650	£1,650	£1,650	£1,650	£1,651	£1,651	£1,651	£1,651	£1,651	£1,651	£1,651	£1,651	£947
3 bed hse	£1,850	£1,850	£1,850	£1,850	£1,850	£1,850	£1,893	£1,893	£1,893	£1,898	£1,898	£1,898	£1,898	£1,122
4 bed hse	£2,751	£2,751	£2,751	£2,750	£2,750	£2,750	£2,750	£2,700	£2,700	£2,700	£2,700	£2,700	£2,650	£1,446
East Cambridgeshire													Cambridge BRMA	
1 bed flat	£798	£775	£800	£800	£800	£798	£775	£795	£795	£800	£800	£801	£801	£898
2 bed flat	£949	£950	£950	£950	£963	£975	£986	£996	£996	£1,000	£1,000	£1,000	£1,000	£947
2 bed hse	£1,001	£1,048	£1,001	£1,048	£1,048	£1,050	£1,050	£1,050	£1,050	£1,050	£1,073	£1,100	£1,100	£947
3 bed hse	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,122
4 bed hse	£1,698	£1,750	£1,780	£1,750	£1,780	£1,874	£1,800	£1,799	£1,798	£1,750	£1,800	£1,800	£1,800	£1,446
Fenland													Kings Lynn BRMA	
1 bed flat	£624	£624	£625	£628	£646	£629	£641	£650	£646	£650	£650	£650	£650	£773
2 bed flat	£749	£749	£749	£750	£770	£770	£750	£750	£750	£775	£775	£775	£775	£573
2 bed hse	£825	£833	£825	£849	£849	£849	£849	£850	£850	£850	£850	£850	£850	£573
3 bed hse	£950	£950	£975	£950	£975	£975	£975	£975	£975	£985	£996	£998	£947	£648
4 bed hse	£1,374	£1,399	£1,399	£1,399	£1,400	£1,399	£1,400	£1,400	£1,499	£1,499	£1,499	£1,500	£1,346	£922
Huntingdonshire													Huntingdon BRMA	
1 bed flat	£749	£749	£749	£750	£749	£750	£750	£775	£775	£763	£750	£750	£673	£449
2 bed flat	£950	£950	£950	£950	£950	£975	£975	£975	£996	£995	£996	£1,000	£893	£573
2 bed hse	£975	£975	£995	£995	£995	£995	£995	£995	£995	£995	£998	£996	£893	£573
3 bed hse	£1,250	£1,250	£1,262	£1,295	£1,295	£1,298	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,097	£648
4 bed hse	£1,700	£1,700	£1,700	£1,700	£1,700	£1,750	£1,798	£1,798	£1,798	£1,772	£1,798	£1,800	£1,311	£922
Peterborough													Peterborough BRMA	
1 bed flat	£702	£702	£720	£713	£713	£720	£723	£723	£723	£723	£719	£702	£702	£449
2 bed flat	£949	£949	£949	£949	£949	£949	£949	£949	£949	£949	£949	£949	£925	£573
2 bed hse	£925	£949	£949	£949	£949	£949	£950	£950	£950	£950	£950	£950	£950	£573
3 bed hse	£1,148	£1,150	£1,150	£1,148	£1,150	£1,150	£1,150	£1,150	£1,162	£1,195	£1,175	£1,174	£1,150	£648
4 bed hse	£1,451	£1,495	£1,495	£1,495	£1,499	£1,499	£1,500	£1,500	£1,500	£1,525	£1,550	£1,549	£1,549	£922
South Cambridgeshire													Cambridge BRMA	
1 bed flat	£1,001	£1,025	£1,048	£1,048	£1,048	£1,048	£1,049	£1,050	£1,096	£1,100	£1,100	£1,100	£1,100	£898
2 bed flat	£1,397	£1,399	£1,397	£1,399	£1,399	£1,399	£1,399	£1,399	£1,399	£1,399	£1,400	£1,400	£1,399	£947
2 bed hse	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,350	£1,350	£1,350	£1,350	£1,325	£947
3 bed hse	£1,527	£1,550	£1,551	£1,575	£1,594	£1,599	£1,599	£1,599	£1,599	£1,600	£1,600	£1,600	£1,600	£1,122
4 bed hse	£2,002	£2,000	£2,002	£2,000	£2,000	£2,000	£2,000	£2,002	£2,000	£2,000	£2,002	£2,002	£2,002	£1,446
West Suffolk													Bury St Edmunds BRMA	
1 bed flat	£849	£850	£850	£850	£850	£850	£850	£875	£875	£896	£875	£875	£875	£628
2 bed flat	£1,125	£1,126	£1,126	£1,126	£1,148	£1,148	£1,125	£1,126	£1,148	£1,148	£1,148	£1,148	£1,148	£773
2 bed hse	£1,125	£1,126	£1,148	£1,148	£1,148	£1,148	£1,150	£1,150	£1,150	£1,150	£1,150	£1,150	£1,150	£773
3 bed hse	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£952
4 bed hse	£1,700	£1,720	£1,699	£1,700	£1,700	£1,750	£1,750	£1,750	£1,750	£1,798	£1,750	£1,800	£1,700	£1,296
East of England														
1 bed flat	£950	£975	£975	£975	£979	£995	£995	£996	£996	£996	£996	£1,000	£1,000	
2 bed flat	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	£1,300	
2 bed hse	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200	£1,200	£1,226	£1,226	£1,248	
3 bed hse	£1,499	£1,499	£1,499	£1,499	£1,499	£1,500	£1,500	£1,500	£1,500	£1,500	£1,545	£1,500	£1,525	
4 bed hse	£2,045	£2,100	£2,100	£2,100	£2,101	£2,101	£2,127	£2,149	£2,150	£2,168	£2,200	£2,200	£2,200	

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

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 30 sets out the boundaries for 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 12 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 12 we've added the LHA rates for that area. Table 13 sets out the sample size used for rents.

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

https://assets.publishing.service.gov.uk/media/679c9493c496e5d3ddaf61d/2025-26_LHA_TABLES.xlsx

Figure 30 Broad Rental Market Area (BRMA) boundaries

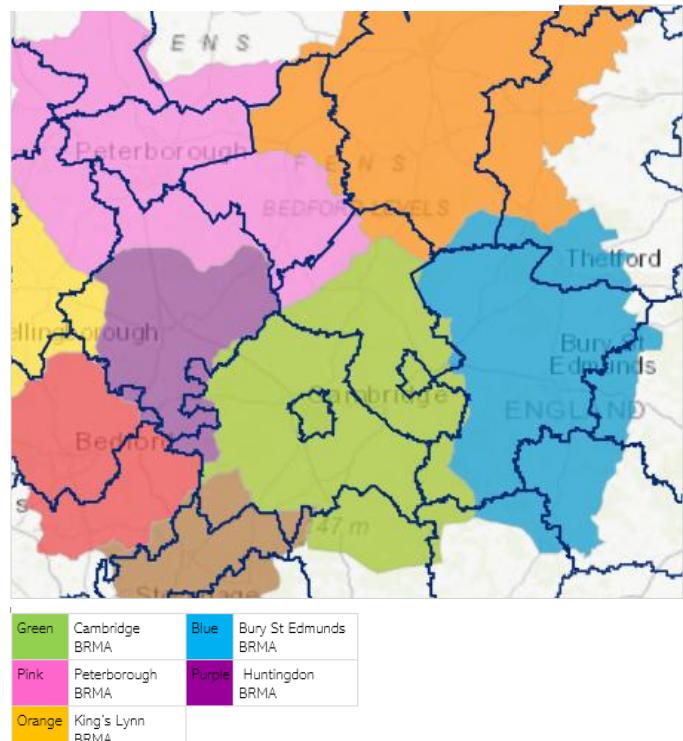


Table 13. Sample size unique listings – rent

	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
Cambridge	3,283	3,222	3,251	3,223	3,254	3,219	3,269	3,300	3,358	3,403	3,461	3,511
East Cambs	641	639	647	635	650	652	667	674	682	683	701	721
Fenland	799	790	775	769	784	787	805	794	802	794	771	795
Huntingdonshire	1,078	1,057	1,045	1,028	1,012	998	986	968	949	961	931	932
Peterborough	2,439	2,397	2,367	2,353	2,389	2,391	2,418	2,426	2,480	2,545	2,577	2,624
South Cambs	1,657	1,615	1,644	1,646	1,669	1,648	1,610	1,584	1,614	1,655	1,688	1,718
West Suffolk	1,332	1,318	1,323	1,313	1,279	1,282	1,280	1,282	1,288	1,270	1,251	1,265
East of England	53,972	53,130	53,395	53,572	54,293	54,011	54,530	54,684	55,269	56,047	56,179	56,901

Affordability ratios

For Edition 67 we are again “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.



Comparing housing costs across tenures and sizes

This page shows...

Table 14 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 68. This is a major gap locally, as new build prices were often the highest of all tenures in the past. Blank cells denote that no data is available for this type or size of home in this district. Although costs are not available for 4+ beds of all tenures, there is enough data now to start adding these in, reflecting larger properties. Will investigate secure more 4+ bed costs for future editions.

In Edition 67, again the highest monthly cost almost everywhere is commanded by larger 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 in [Table 14](#) the lowest weekly cost is highlighted in pale green and the highest in pale yellow. 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 very cost effective, for example in Fenland, 2 bed shared ownership flats can be 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 14. Comparing monthly 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 LG resale	Buy median resale
Cambridge										
1-bed flat	455	750	503	559	732	1,080	1,350	939	878	1,007
2-bed flat	529	832	594	650	802	1,358	1,698	1,252	1,205	1,454
2-bed house	529	832	594	650	802	1,321	1,651	1,566	1,512	1,756
3-bed house	594	975	654	659	901	1,518	1,898	2,129	1,821	2,238
4+ bed house	693	1,296	750	758	1,168	2,120	2,650	–	–	–
East Cambridgeshire										
1-bed flat	–	–	459	481	654	641	801	520	539	632
2-bed flat	–	–	537	542	776	800	1,000	697	617	683
2-bed house	–	–	537	542	776	880	1,100	908	882	977
3-bed house	–	–	594	598	862	1,040	1,300	1,202	1,137	1,280
4+ bed house	–	–	650	659	1,161	1,440	1,800	–	–	–
Fenland										
1-bed flat	–	–	420	442	464	520	650	290	261	293
2-bed flat	–	–	472	490	589	620	775	391	439	459
2-bed house	–	–	472	490	589	680	850	648	644	726
3-bed house	–	–	520	529	676	798	998	828	820	907
4+ bed house	–	–	585	594	836	1,200	1,500	–	–	–
Huntingdonshire										
1-bed flat	–	–	433	472	589	600	750	517	429	488
2-bed flat	–	–	503	524	719	800	1,000	673	638	683
2-bed house	–	–	503	524	719	797	996	861	820	956
3-bed house	–	–	550	559	854	1,040	1,300	1,126	1,042	1,229
4+ bed house	–	–	628	637	1,066	1,440	1,800	–	–	–
Peterborough										
1-bed flat	–	–	394	429	533	562	702	363	379	429
2-bed flat	–	–	464	485	663	740	925	521	507	556
2-bed house	–	–	464	485	663	760	950	658	683	742
3-bed house	–	–	498	503	715	920	1,150	877	820	956
4+ bed house	–	–	546	550	858	1,239	1,549	–	–	–
South Cambridgeshire										
1-bed flat	472	689	481	511	711	880	1,100	689	722	779
2-bed flat	555	819	581	602	854	1,119	1,399	871	820	971
2-bed house	555	819	581	602	854	1,060	1,325	1,127	1,073	1,210
3-bed house	585	953	654	663	1,018	1,280	1,600	1,513	1,385	1,561
4+ bed house	663	1,287	711	724	1,235	1,602	2,002	–	–	–
West Suffolk										
1-bed flat	–	–	416	442	594	700	875	545	449	566
2-bed flat	–	–	481	490	711	918	1,148	767	634	743
2-bed house	–	–	481	490	711	920	1,150	861	859	954
3-bed house	–	–	529	533	819	1,040	1,300	1,096	1,005	1,151
4+ bed house	–	–	589	594	1,075	1,360	1,700	–	–	–
East of England										
1-bed flat	412	672	451	490	628	800	1,000	705	556	703
2-bed flat	477	784	520	542	771	1,040	1,300	908	722	917
2-bed house	477	784	520	542	771	998	1,248	1,096	871	1,093
3-bed house	537	945	585	589	888	1,220	1,525	1,378	1,101	1,366
4+ bed house	602	1,183	654	663	1,092	1,760	2,200	–	–	–

① 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
Median 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 SODCLADR 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 and LCHD homes excluded. Annual update.		
LADR 2024-25	Apr 2024 to Mar 2025	October 2025
Median 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 2024-25	Apr 2024 to Mar 2025	October 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 – Sept 2025	Oct 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 – Sept 2025	Oct 2025
Median cost of buying 40% shared ownership (FKA 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 – Sept 2025	Oct 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 – Sept 2025	Oct 2025

Ladders of housing affordability

Table 14 is used to create our "ladders" graphic at Figure 31.

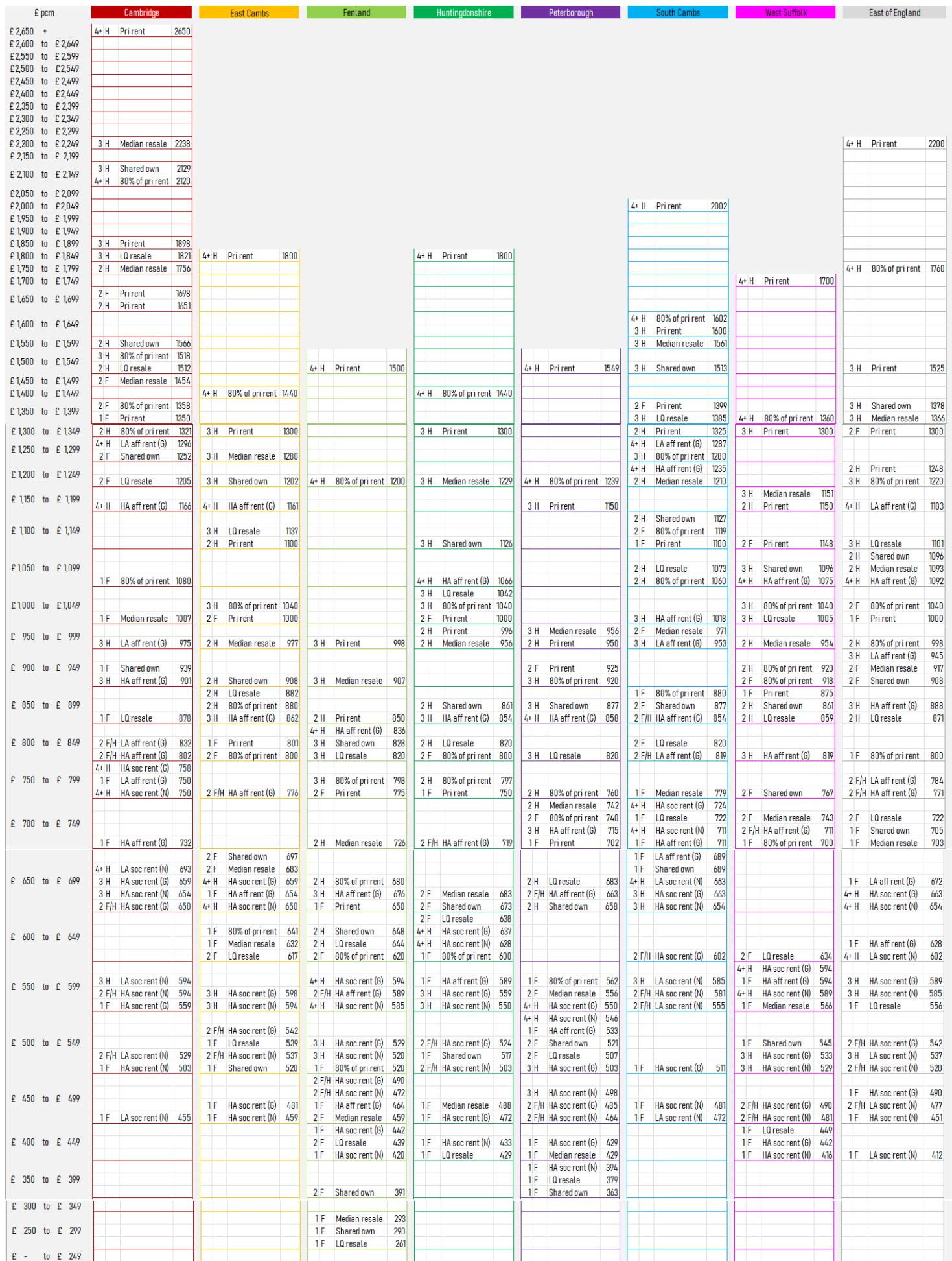
- Weekly housing costs from page 19 are presented here in the format of ladders. The aim is to help compare the cost of different size and tenure homes, between districts – and for the FIRST time – for the region. This should be helpful for comparison purposes!
- The price scale on the left hand side uses £50 as it's "unit" for each rung of the ladder, in terms of monthly housing cost. So the scale reads, for example, £1,000 to £1,049 then £1,050 to £1,099.
- The cost of each housing option are set out in the left-hand column within each district's ladder – you will notice that in some districts there is more than one housing option on a rung – so the rungs are not equally spaced. Apologies to anyone who works in health and safety but maybe it's an allegory for how difficult it is to climb the housing ladder!
- The housing options are ordered within a district's ladder from top down: most expensive at the top to least expensive at the bottom.
- The source of data is the same as for Table 14 and are set out in full in the 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.
- Sadly, once again we have not been able to find "new build" prices which last appeared in Edition 65, however we are working on it!
- As there is so much information to cram onto one page of the Bulletin, we are sharing the ladders in excel format on the Cambridgeshire Insight Bulletins page – [here](#). For the best formatting, please download the file which should be easy to zoom in & out, so hopefully that makes it more accessible.



Key to abbreviations

- 1 2 3 4+ number of bedrooms
- H: House
- F: Flat
- F/H: either house or flat (some data sources do not differentiate)
- Pri rent: median private rent
- 80% of pri rent – a simple calculation of 80% of the median private rent in an area. Used mainly by social landlords when calculating 'affordable rent' levels. In previous bulletins, was referred to as the intermediate rent level.
- Resale: second hand property purchase (i.e. not new build homes). Both median and lower quartile (LQ) resale prices are included
- Shared own: shared ownership where the initial share purchased represents 40% of the value of the property. See "source data" table for more detail.
- LA or HA aff rent: council or housing association affordable rents. These rents can be set at up to 80% of local private rent levels
- LA or HA soc rent. Usually the most affordable housing option in our area.
- (N) = net
- (G) = gross

Figure 31 Ladders of affordability



See also [here](#) for a "zoomable" version

Background

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.

For more information please contact:

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- Mobile 07957 427772
- E-mail: rallan@hometrack.com

Maps

Figure 32 shows the East of England region green, with all its constituent districts outlined in black. Figure 33 shows and the districts covered in this bulletin in more detail, which are:

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

Figure 34 highlights the boundaries of the districts in the Bulletin in pink, and in slightly more detail.

Key to colours throughout bulletin:

Cambridge	Red	South Cambs	Blue
East Cambs	Yellow	West Suffolk	Pink
Fenland	Grey	East of England	Dark Grey
HDC	Green	England	Black
Peterborough	Dark Purple		

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 67	Edition 68	Edition 69	Edition 70
Data for...	Sept 2025	Dec 2025	March 2026	June 2026
Bulletin publication...	Dec 2025	Mar 2026	June 2026	Sept 2026
Ntcs...	This Edition!	March 2026 edition	June 2026 edition	Sept 2026 edition



Figure 32 East of England region

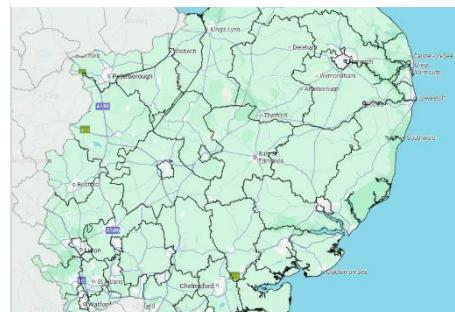
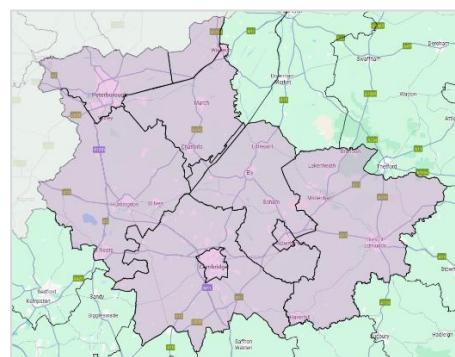


Figure 33 Districts around our market area



Figure 34 Districts covered in this Bulletin



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Table 15. Summary of metadata and pages where the data is used

Time Series	Data Source	Series Timespan	Data Refresh Frequency	Last Refresh	Geography Levels	Metric	Rolling Period calculated over	Used on pages..
Sold & Valuation Price (Bed count/type)	Hometrack HM LR (England & Wales)	Jan 2016 – Sept 2025	Monthly	Oct 2025	Region/LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/Ninetieth Percentile	3 month rolling window	5, 6, 7, 11, 12, 13, 20
Sold Price	HMLR(England & Wales)	Jan 2016 – Sept 2025	Monthly	Oct 2025	Region/LA/ Postcode Area	Lower Quartile/Median/Upper Quartile/Ninetieth Percentile	3 month rolling window	8, 9, 10, 11
Time to sell	Zoopla Listings	Feb 2019 – Sept 2025	Monthly	Oct 2025	Region	Median	3 month rolling window	14
Time to sell	Zoopla Listings	Feb 2019 – Sept 2025	Monthly	Oct 2025	LA/Postcode Area	Median	6 month rolling window	14
Asking price achieved	Zoopla/HMLR (England & Wales),	Dec 2023 – Sept 2025	Monthly	Oct 2025	Region	Median	3 month rolling window	15
Asking price achieved	Zoopla/HMLR (England & Wales),	Dec 2023 – Sept 2025	Monthly	Oct 2025	LA/Postcode Area	Median	6 month rolling window	15
Rental Asking Price	Zoopla Listings	Jan 2016 – Sept 2025	Monthly	Oct 2025	Region/LA/ Postcode Area/ Postcode District	Lower Quartile/Median/Upper Quartile/Ninetieth Percentile	12 month rolling window	16, 20