

A stylized map of the United Kingdom is shown in a light blue color against a darker blue background. Overlaid on the map is a network of thin white lines connecting various points. Some of these points are highlighted with bright blue, glowing circles, while others are smaller, dimmer white dots. The network appears to represent a digital or communication infrastructure.

brandvaughan

Quarterly Market Update

Q3 | 2025

South Coast - East

Reaching from Brighton to Worthing, our branches in the South Coast - East region are market leaders for sales and lettings.

Michael Jones
brandvaughan

We've called Sussex home for decades. Our team is built on strong local roots, offering honest advice and real support to help you find the right property or make the best decision for your future. We're not just about transaction volumes, we're connected the people and places we know.

LETTINGS

Demand reductions but a strong applicant to property ratio should reassure landlords.

Opportunities

Market appraisals

▲ 23%

Q3 2025

184 vs 149 Q3 2024

Demand

Tenants

▼ -43%

Q3 2025

3,447 vs 6,081 Q3 2024

SALES

A temporarily subdued market in sales, but the popular South Coast remains a safe investment.

Opportunities

Market appraisals

▼ -18%

Q3 2025

939 vs 1,143 Q3 2024

Demand

Buyers

▼ -22%

Q3 2025

2,252 vs 2,900 Q3 2024



“As housing prices continue to increase, purchasing property remains a prudent long-term investment on the South Coast; those with the financial means should consider doing so sooner rather than later.”

Rob Mott

Chief Revenue Officer

Opportunities through change

Biding time

Whilst the Renters' Rights Act passed into law at the end of October, many landlords continue to express uncertainty about its potential impact on their investments. A number of them have adopted a cautious approach, postponing major decisions until the post-Act market landscape becomes clearer. While many landlords have tested the sales market, most are opting to keep their properties, reflecting confidence in future market conditions once the new legislation is introduced.

Supply and demand within the rental market remain largely unchanged, with significantly more tenants seeking accommodation than there are available properties. Smaller two and three bedroom, well-maintained homes continue to attract the highest levels of interest among tenants.

Although rental prices have risen over the past year, many landlords are prioritising the retention of reliable tenants rather than maximising rent. This approach helps explain why rental growth has slowed to its lowest level since 2017.

Activity amongst buy-to-let investors has remained consistent with last quarter; however, there has been a noticeable decline in first-time buyers entering the market. This trend may

be closely linked to rising house prices across the South Coast and the additional Stamp Duty costs, prompting many to carefully evaluate the financial implications of moving.

Certain auxiliary services continue to grow in popularity as landlords take additional measures to safeguard their investments amid the changes introduced by the Renters' Rights Act. Namely, there has been an increase in interest in landlords opting in to our Rent & Legal Protection service, while tenant-focused initiatives such as our No Deposit Scheme are also gaining momentum.

Buyers' market

With respect to the sales side, there has been an increase in migration along the south coast, with many people relocating to West Sussex from East due to better affordability and people wanting to maximise on space.

Mid-range freehold properties priced between £400,000 and £900,000 continue to perform well, with approximately 90% of sales currently in progress being freehold properties. This strong demand has led to a shortage of available freehold stock. However, properties priced above £1 million are facing slower movement due to uncertainty around Stamp Duty, but if sellers are patient they can still

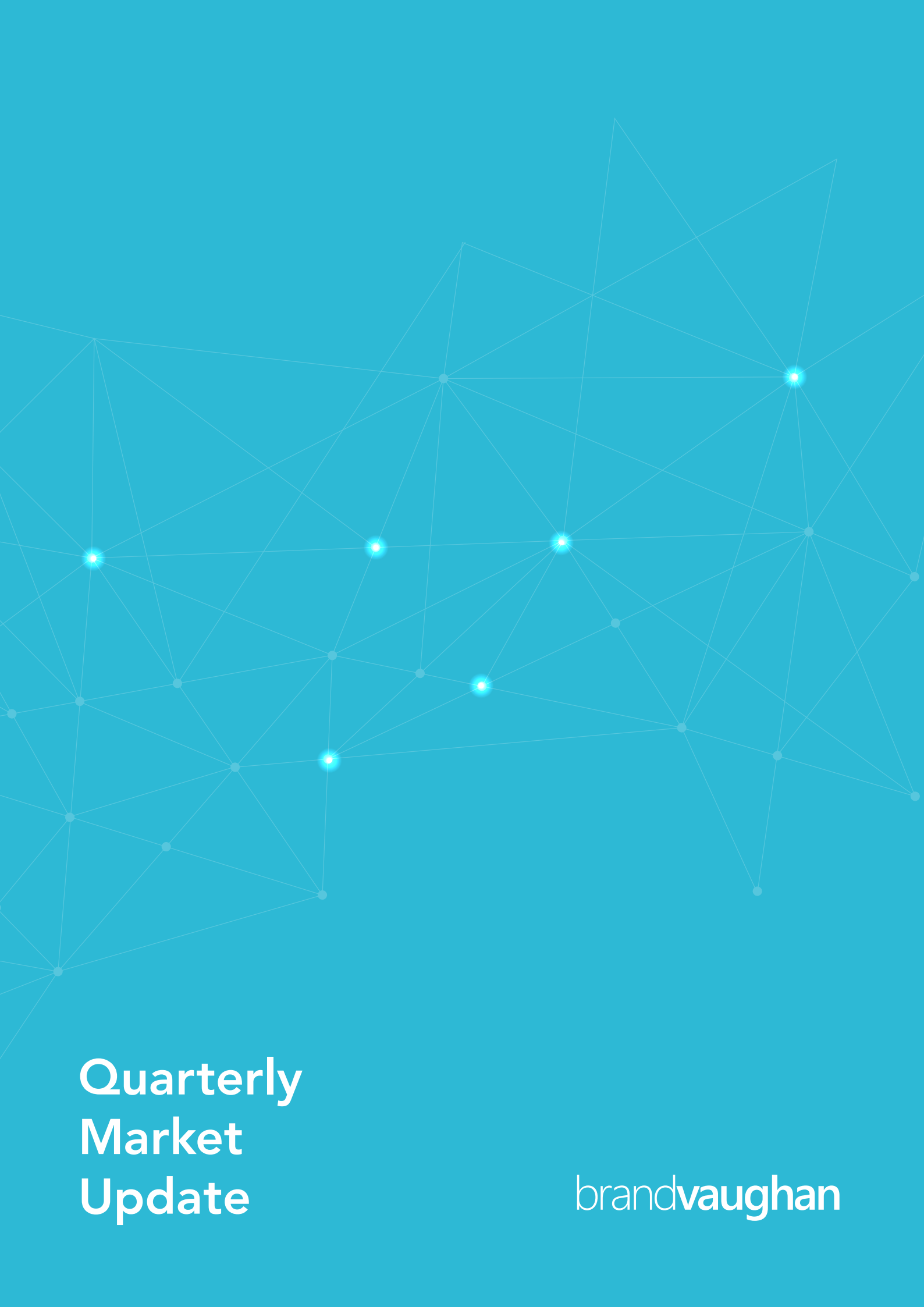
be successful in the upper echelons of the marketplace.

It has been a strong year for Auctions overall, with properties sold via Auction increasing by 100% year on year. As transaction times have lengthened, Auctions have proven to be an efficient alternative, offering certainty of sale in a closed timeframe of 56 days. This is further supported by Auction income rising by 169% since the same time period last year.

Expecting market evolution

As the market moves into Q4, updates are expected regarding not only the imminent passing of the Renters' Rights Act, but also clarity regarding implementation timelines. The primary focus of Brand Vaughan and Michael Jones remains on supporting and informing landlords through the new legislation, to enable them to navigate the changes with confidence and in their best investment interests.

First-time buyers are encouraged to take advantage of current market conditions. Purchasing a home is a long-term investment, and with property values historically rising over time, buying now could be a smart financial move.



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