THE LETTINGS HUB
the home for lettings

LET'S TALK LETS

QUARTERLY MARKET MONITOR

Welcome to Lettings Hub's latest Quarterly Market Monitor, featuring insights from our extensive dataset of over 100,000 renters collected over several years. In this edition, we take a deeper look at the profile of affordability of renters across the UK's major cities.

Q3 2025

The UK Rental Affordability Challenge

Renters across the UK continue to spend a significant share of their income on rent, with affordability challenges evident even in lower-income areas. As the Renters' Rights Act is expected to place further upward pressure on rents, agents should ensure knowledge of market rates for Section 13's, and also ensure landlords are protected through Rent and Legal Protection and Professional Guarantors.



TENANCY LENGTH

RENTER AGE

AFFORDABILITY

AVERAGE RENTS

Median monthly rents

Arrows show direction of rents change over last year

Scotland	**£850**/£900 ↓
North East	**£1,250**/£825 ↑
North West	**£1,050**/£1,100 ↓
Yorkshire and the Humber	**£850**/£850 –
East Midlands	**£930**/£903 ↑
West Midlands	**£1,090**/£986 ↑
South East	**£1,500**/£1,378 ↑
South West	**£1,346**/£1,250 ↑
East of England	**£1,251**/£1,200 ↑
London	**£2,251**/£2,152 ↑
Wales	**£875**/£1,000 ↓

Q3 2025 / Q3 2024

Market update

In the third quarter of 2025, average UK rents were 4.3% higher than a year earlier, with modest growth in many regions. Typical of the summer quarter, the renter age profile skewed younger, while initial lease lengths held steady. Affordability continued to ease slightly.

LEASE LENGTH IN MONTHS

13.7 Q3 2025

13.7 Q3 2024

AVERAGE AGE OF RENTERS IN YEARS

27 Q3 2025

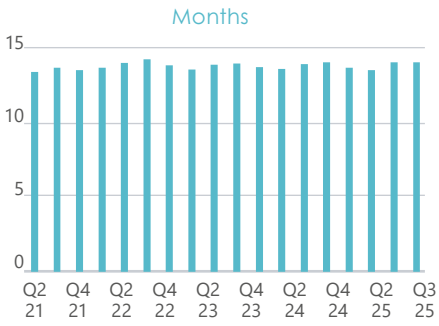
28 Q3 2024

PERCENTAGE OF INCOME SPENT ON RENT

29.1 Q3 2025

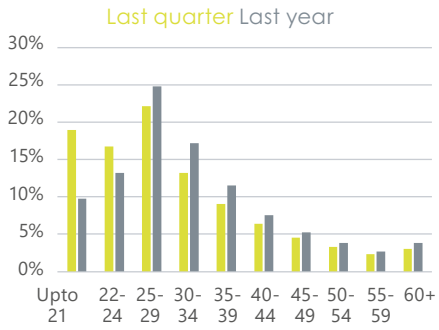
29.5 Q3 2024

Tenancy length over time



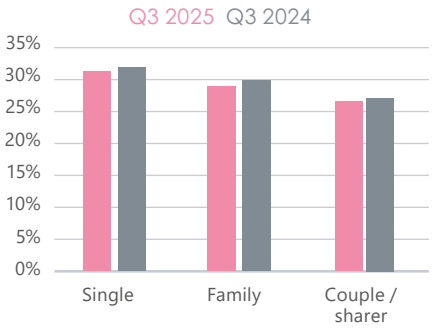
Source: Lettings Hub showing average initial lease length

Renters by age band



Source: Lettings Hub, showing median age

Affordability by household type



Source: Lettings Hub showing median % household income spent on rent

AVERAGE MONTHLY RENT | AVERAGE CHANGE IN RENT

Q3 2025

All of UK

£1,460 ↑ 4.3%

UK excl. London

£1,200 – 0.0%

London

£2,251 ↑ 4.7%

Source: Lettings Hub, based on median rents

By property type

Detached house

£1,895 ↑ 8.3%

Semi-detached

£1,400 ↑ 0.9%

Terraced

£1,300 – 0.0%

Flats

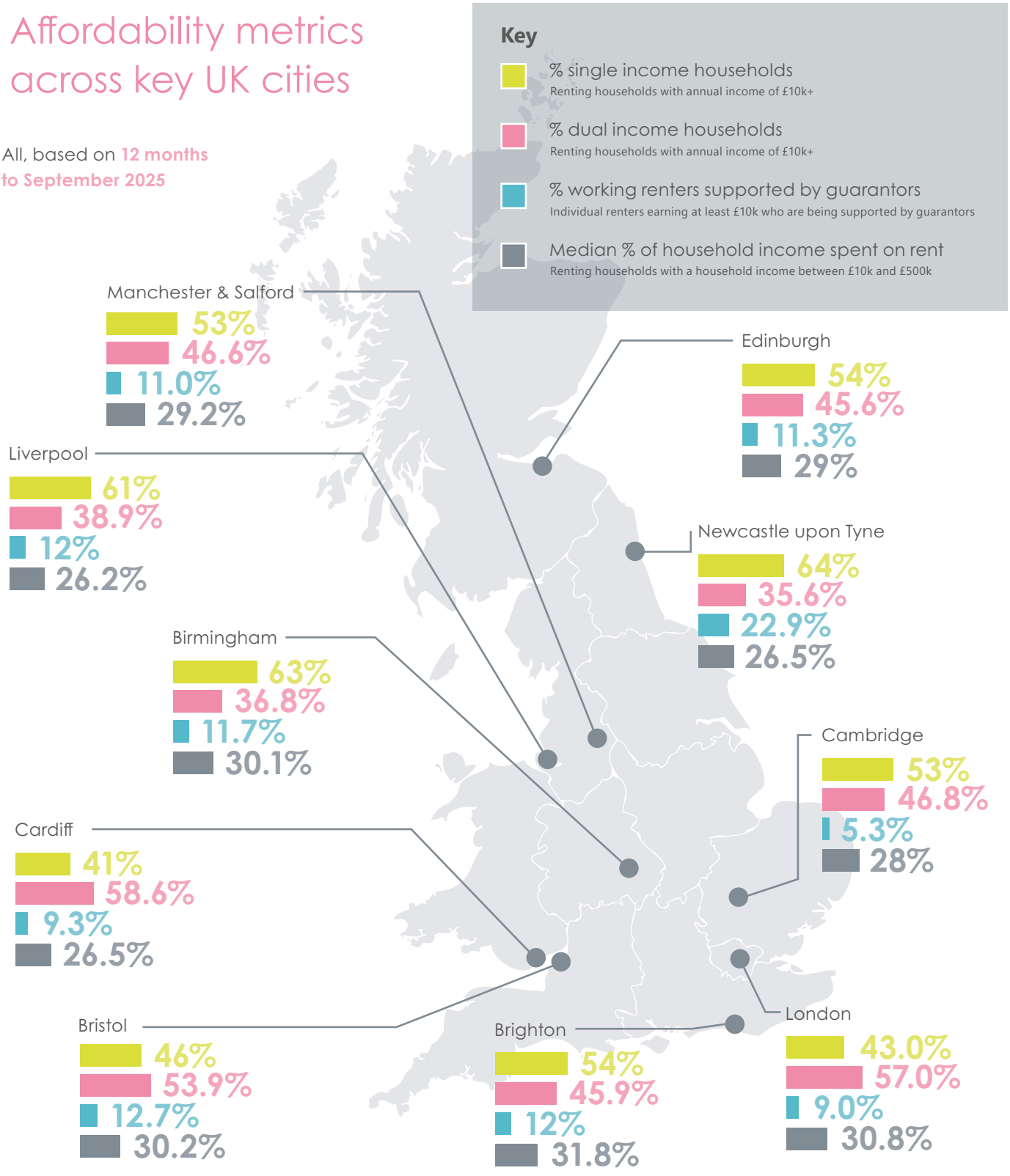
£1,500 ↑ 7.1%

City rental affordability pressures

Affordability pressures vary across UK cities. While the share of income spent on rent is not significantly different in many cities, lower income areas tend to rely more on guarantors to access housing. Elsewhere, households adapt to affordability constraints by compromising on property or location, or by sharing with other earners to meet rental costs.

Affordability metrics across key UK cities

All, based on **12 months to September 2025**



Source: Lettings Hub, last 12 months

THE LETTINGS HUB
the home for lettings

Scan to find your solution!

2025 FUTURE-PROOF YOUR AGENCY FOR 2026 WITH THE LETTINGS HUB. ELEVATE YOUR AGENCY WITH A TAILORED SOLUTION FOR

FOR ONE FIXED PRICE PER LET

HOW DOES IT WORK?

STEP 1
Choose one of our tiered services, or build a bespoke BOX to suit your business

STEP 2
Complete order form and agree terms

STEP 3
Within 24 hours we build your BOX and give you platform access

STEP 4
On boarding and support free at anytime throughout our partnership

STEP 5
Go live! Launch your enhanced proposition to your landlords

STEP 6
Pay as you go. Simple 'one fixed price per let' monthly billing commences

THE LEGAL EXPENSES ONE| £45.00 PER LET

1 | UNLIMITED TENANTRE FERENCING
Including PreQualify & Guarantors

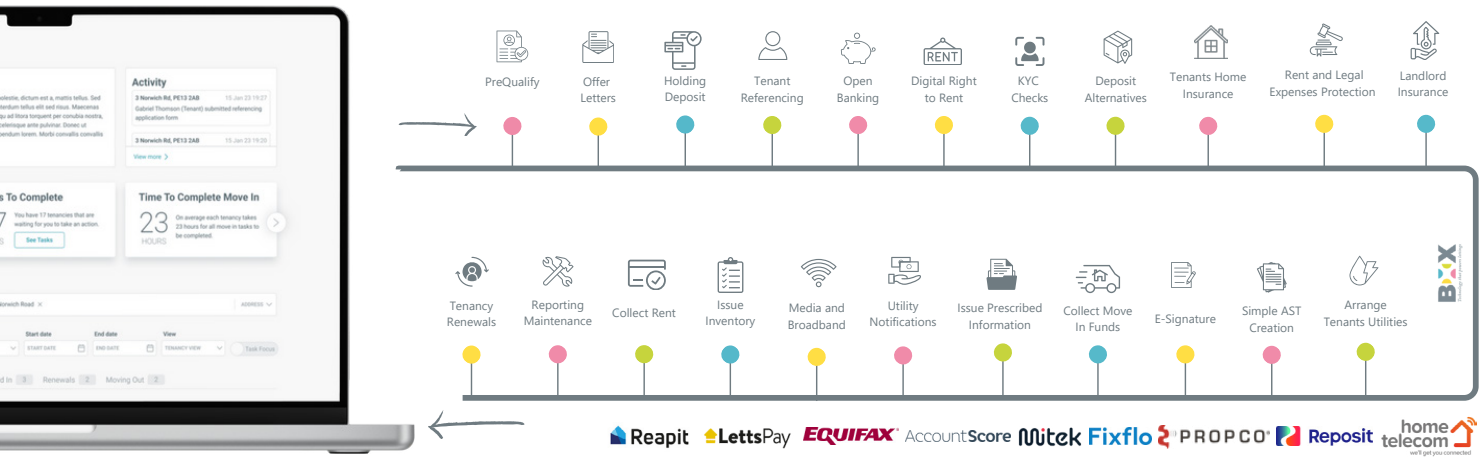
2 | COMPLETE UTILITY MANAGEMENT
Free utility notifications and optional void management

3 | SUPPORT FOR YOUR TENANTS
Tenants Home Insurance, Pet Damage and utility deals

4 | COMMISSION PAYABLE
On all landlord insurance products and 2025 releases

5 | ACCESS TO ALL BOX FEATURES
Including all future updates and releases in the system

6 | LEGAL EXPENSES PROTECTION
Protect every landlord from unnecessary legal costs



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BOX | Rental

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PriceHubble | dataloft

www.pricehubble.com/uk

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