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 and assessing the profile of affordability of renters across the UKs major cities.

Q4 2025



The UK Rental Affordability Challenge

Affordability pressures vary across UK rental markets, but in most cities, tenants spend around 30% of their income on rent. In Q4 2025, 13% of renters in major cities still needed a guarantor. With rolling tenancies becoming the norm from 1st May, many friends and family are understandably hesitant to take on the long-term responsibility of being a guarantor.

Professional guarantor services provide a smart solution—helping tenants move freely while giving landlords peace of mind. **Talk to us today to find out more!**

TENANCY LENGTH

RENTER AGE

AFFORDABILITY

AVERAGE RENTS

Median monthly rents

Arrows show direction of rents change over last year

	Q4 2025 / Q4 2024	
Scotland	£875/£800	↑
North East	£800/£750	↑
North West	£995/£1,050	↓
Yorkshire and the Humber	£800/£800	–
East Midlands	£926/£925	–
West Midlands	£1,000/£976	↑
South East	£1,370/£1,350	↑
South West	£1,200/£1,200	–
East of England	£1,200/£1,150	↑
London	£2,131/£2,002	↑
Wales	£898/£900	–

Market update

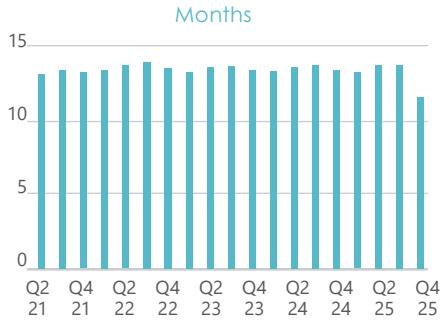
In the final quarter of 2025, average UK rents fell 3.8% year-on-year, although this national average masks continued growth in several regions. Average initial lease lengths shortened, possibly in anticipation of the upcoming Renters' Rights Act implementation. Affordability improved slightly for families and couples/sharers.

LEASE LENGTH IN MONTHS

11.5 Q4 2025

13.3 Q4 2024

Tenancy length over time



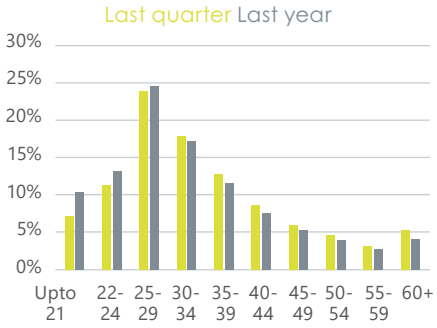
Source: Lettings Hub showing average initial lease length

AVERAGE AGE OF RENTERS IN YEARS

31 Q4 2025

31 Q4 2024

Renters by age band



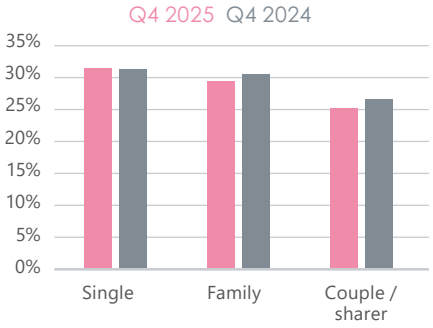
Source: Lettings Hub, showing median age

PERCENTAGE OF INCOME SPENT ON RENT

28.7 Q4 2025

29.1 Q4 2024

Affordability by household type



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

AVERAGE MONTHLY RENT | AVERAGE CHANGE IN RENT

Q4 2025

All of UK

£1,250 ↓ -3.8%

UK excl. London

£1,104 ↓ -2.6%

London

£2,131 ↑ +6.4%

Source: Lettings Hub, based on median rents

By property type

Detached house
£1,610 ↓ -0.2%

Semi-detached
£1,250 ↓ -3.8%

Terraced
£1,150 ↓ -4.2%

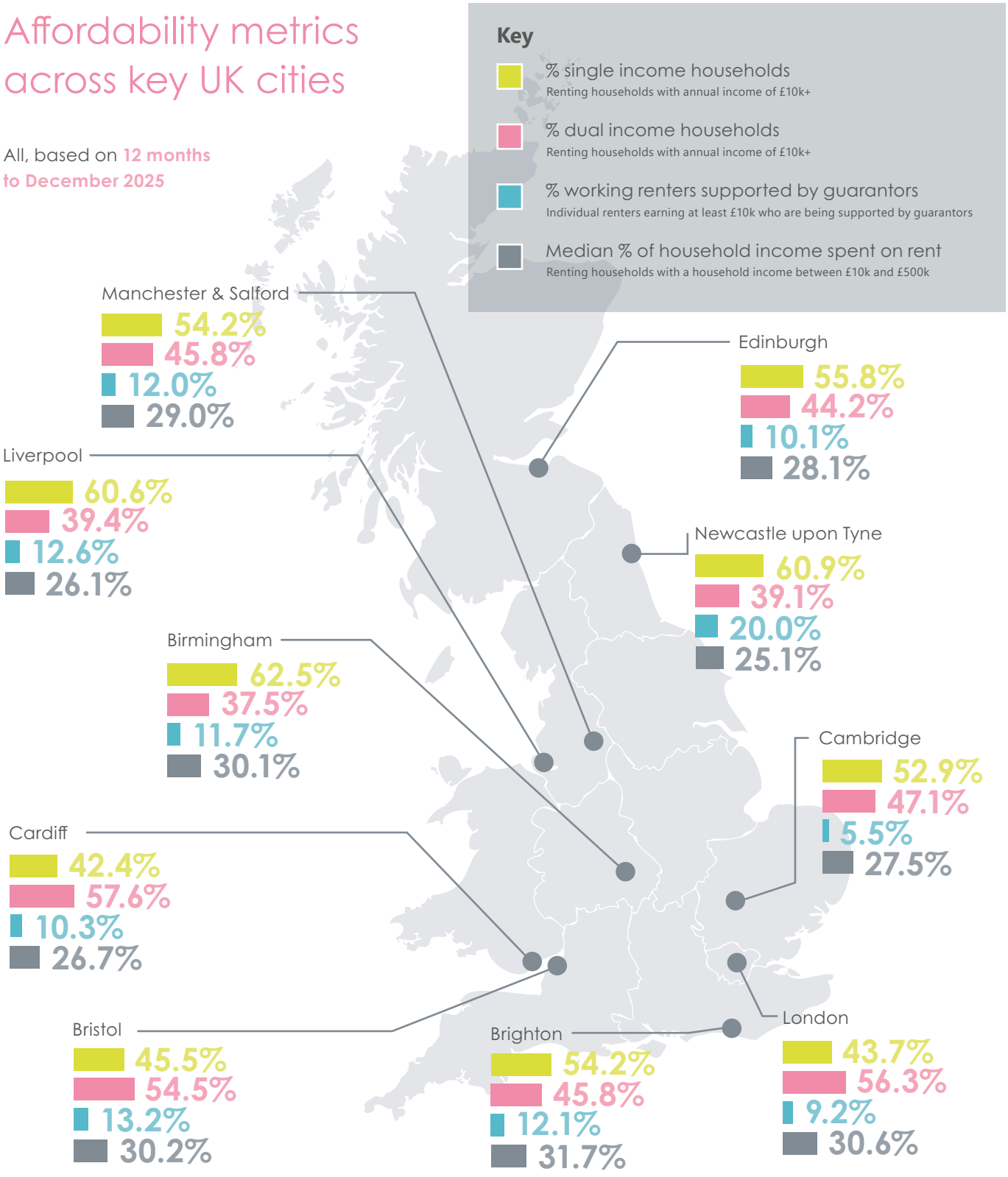
Flats
£1,249 ↓ -4.0%

City rental affordability pressures

UK renters have faced mounting pressure in recent years, with median rent-to-income ratios across cities hovering around 30%, the commonly cited affordability threshold. In 2025, these pressures eased slightly in some locations, most notably Newcastle and Edinburgh, as income growth began to outstrip rises in rents.

Affordability metrics across key UK cities

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



Source: Lettings Hub, last 12 months

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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

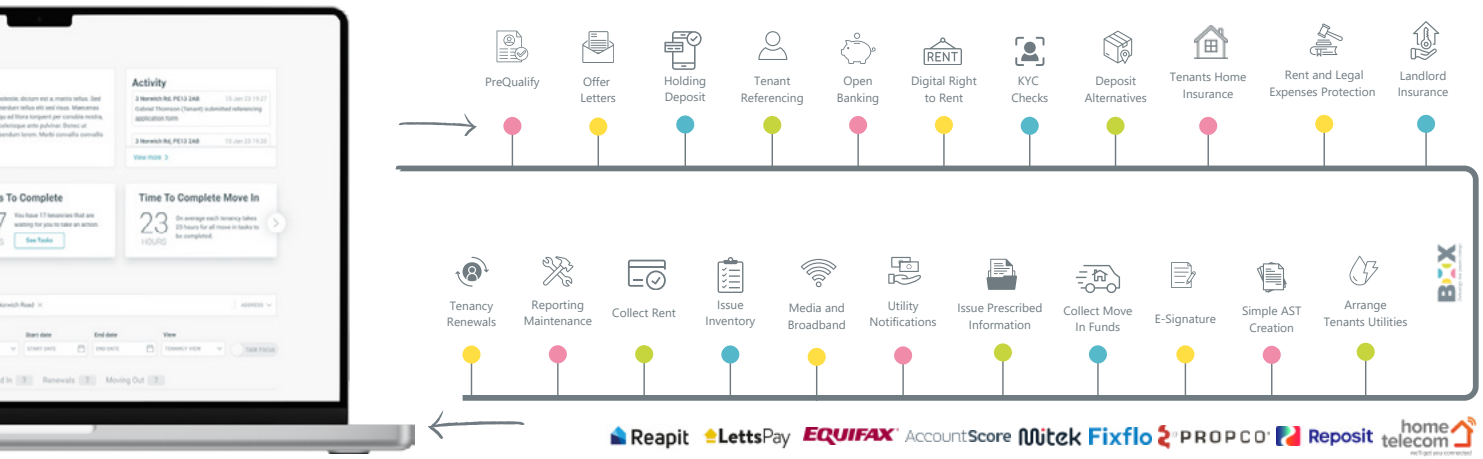
2 | COMPLETE UTILITY MANAGEMENT
Free utility notifications and optional void management

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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