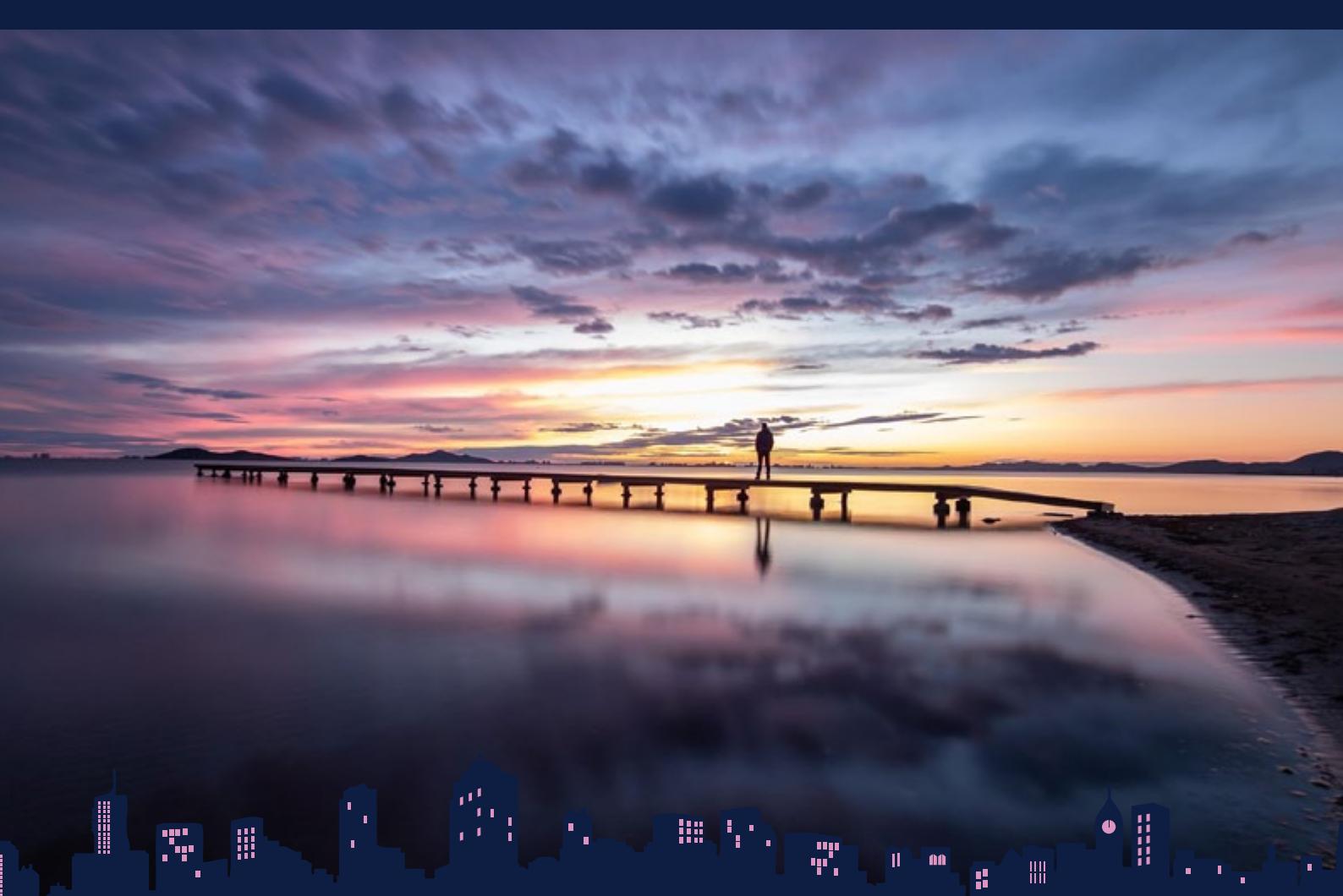


Calm After The Storm



- Market Overview ▪ National Trends
- Spotlights: Edinburgh, Glasgow, Aberdeen, Dundee & more
- Agent Views ▪ Postcode & Town Analysis: Localised Rental Prices
- Pipeline: BTR & MMR news
- SAL: Scottish Letting Day: Bringing Scotland's Letting Community Together
- ESPC: Edinburgh's Property Market Cools Slightly After an Active Year
- TC Young: EPC and MEES Reforms: Key Updates for the Private Rented Sector
- SafeDeposits: SafeDeposits' API is Go!

Market Overview

The final quarter of 2025 experienced the rare pleasure of relative calm after one of the most tempestuous years both within and outwith the Scottish Private Rented Sector.

2025 was characterised by the passing of the Housing (Scotland) Bill to become an Act against a backdrop of incessant global uncertainty from sweeping changes to trade tariffs with the US, giving whiplash to any interested observers. The US Supreme Court will shortly rule as to whether a US president has the constitutional right to dictate such trade policy. The unwinding of tariffs will be welcome to exporting nations and their economies, however the experience has ingrained a deep sense of instability over the future global economy and trade relations.

Further, the UK budgets of 2025 followed unprecedented amounts of leak-based speculation, including fundamental changes to stamp duty and taxation of landlord income. Whilst the majority did not materialise, landlords south of the border have indeed been subject to a change of

income taxation. To the surprise of many, the Scottish administration did not follow in the footsteps of Westminster shortly afterwards, but on the other hand failed to rule it out of future budgets.

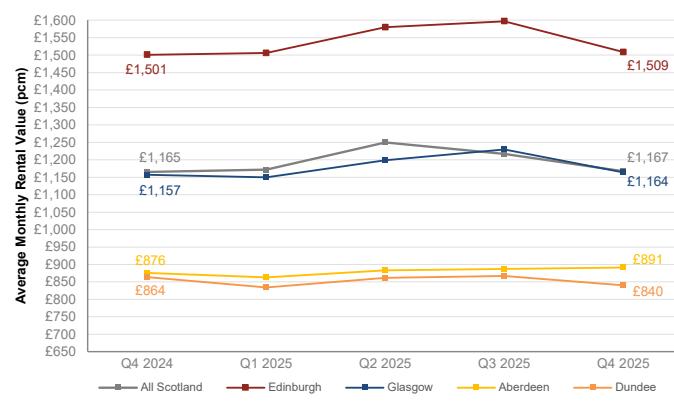
However, with inflation falling back towards target, interest rates continued to fall throughout the maelstrom giving mortgaged landlords material relief with further reductions widely expected. A sense of a better balance between supply and demand has returned to markets in major conurbations, providing a general sense of settledness.

The year began with national annual price inflation at 4.4% which eased consistently to end at just 0.2%. After years of chronic imbalance, conditions improved throughout 2025 in the major cities seeing rents broadly tread water in a narrow range above or below zero, with the exception of Dundee. Consensus is that affordability, not excess demand, determines the ceiling to rental growth.

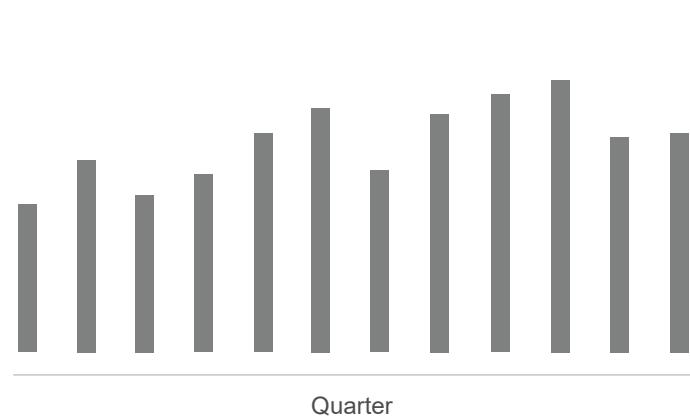
Wider economic and political upheaval seem a nailed-on certainty for 2026. Oil price speculation, with a strong influence on inflation long-term, has been to both the upside and downside reflecting a succession of significant world events concerning major oil producers such as Iran and Venezuela. The outlook is unclear as to whether there will be a global glut or supply shock or just a continued broad balance. Unthinkable strains in the NATO alliance could introduce further uncomfortable economic complications.

If the final quarter of 2025 was characterised by its relative sanguine nature, the beginning of 2026 will have been a rude awakening. Barring a shock to inflation, it is likely the mortgage environment will continue to improve, especially if the wider economy needs additional support through interest rates and this, coupled with better market balance, should provide some comfort to the industry.

Scottish Monthly Rent Analysis (Q4 2024 - Q4 2025)



Scotland - Average Stock Levels (Q1 2023 - Q4 2025)



Citylets commentary is provided by Thomas Ashdown. Please direct media enquiries to press@citylets.co.uk or hello@citylets.co.uk for general enquiries about our reports and statistics. citylets.co.uk

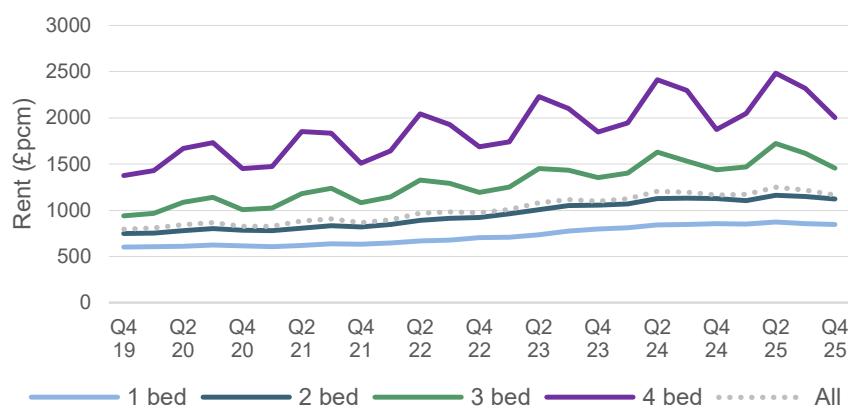
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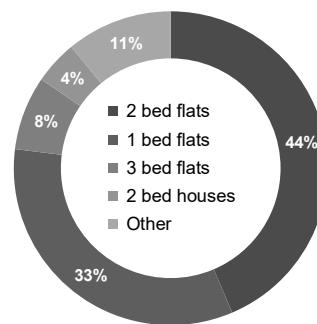
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£848	-0.9%	37.7%	51.2%	22	4	21%	75%
2 bed	£1,122	-0.4%	42.7%	58.7%	27	4	14%	65%
3 bed	£1,457	1.2%	44.4%	64.8%	36	8	11%	51%
4 bed	£2,005	6.9%	38.1%	55.2%	42	-1	9%	42%
All	£1,167	0.2%	41.3%	56.4%	27	4	16%	66%

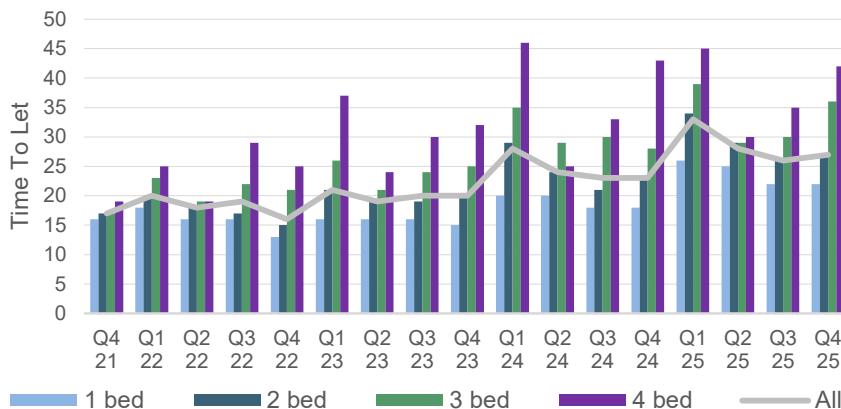
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2008	100.0	101.6	102.8	100.2
2009	98.8	98.1	99.2	97.7
2010	98.9	101.4	100.6	99.8
2011	100.3	102.8	103.9	101.7
2012	102.9	104.2	105.0	104.0
2013	104.7	107.4	106.5	105.1
2014	108.4	112.1	114.1	113.5
2015	116.4	118.1	117.4	115.7
2016	118.9	120.5	120.2	114.6
2017	119.1	122.3	119.7	113.8
2018	120.9	123.9	122.3	119.5
2019	122.9	129.1	127.3	123.6
2020	125.7	130.9	134.1	128.1
2021	128.1	136.9	140.5	134.7
2022	138.9	150.4	152.1	150.7
2023	156.1	167.6	172.9	170.1
2024	174.1	187.1	185.3	180.6
2025	181.7	193.8	188.7	180.9

DJ Alexander - Adrian Sangster

“Scotland’s PRS ended Q4 with continued rental growth, though at a more measured pace than earlier in the year. Tenant demand is beginning to ease slightly from peak levels, while supply has also improved marginally, although it remains well below what is required for a balanced market. Affordability is now a key constraint, with wage growth increasingly influencing rental ceilings. Recent UK Budget taxation announcements may place additional pressure on landlords operating across the UK, which could have some indirect impact in Scotland albeit softened by the devolved nature of taxation. Overall stock remains tight, competition high and well-presented properties continue to let quickly across all major cities.”



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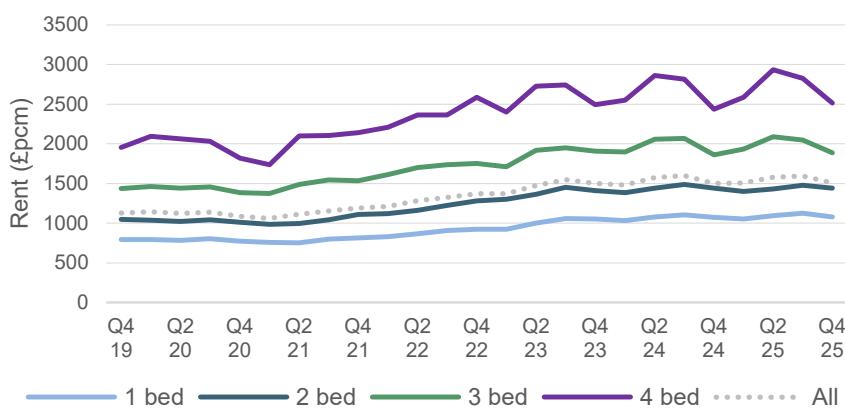
Estate Agency

Edinburgh

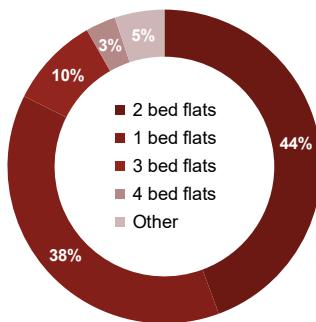
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£1,079	0.7%	39.2%	64.7%	19	3	22%	81%
2 bed	£1,443	-0.1%	42.6%	66.2%	24	1	13%	69%
3 bed	£1,890	1.4%	36.4%	52.5%	36	9	12%	51%
4 bed	£2,517	3.3%	38.4%	45.3%	42	2	4%	39%
All	£1,509	0.5%	39.1%	58.8%	25	3	16%	71%

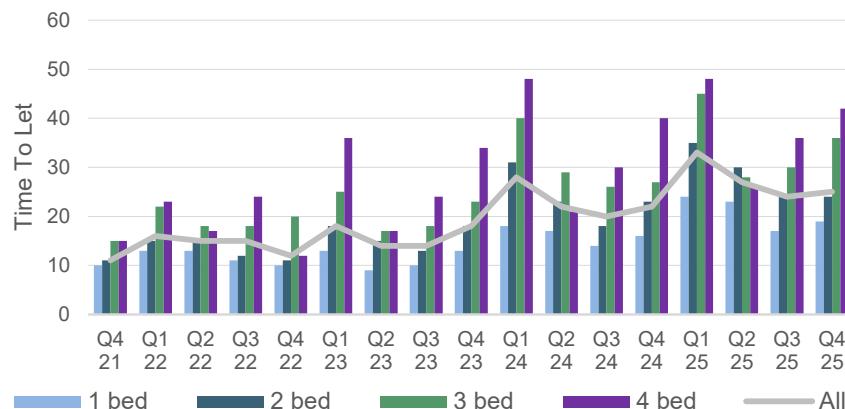
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	113.5	115.1	117.3	120.5
2015	122.1	123.6	126.1	127.2
2016	130.1	132.0	135.6	131.7
2017	136.9	138.8	140.3	136.0
2018	142.2	145.5	148.3	146.6
2019	149.3	151.5	153.7	151.4
2020	152.9	150.2	152.5	145.2
2021	142.3	149.3	154.9	159.6
2022	162.5	171.8	177.6	183.4
2023	183.7	197.7	207.0	201.2
2024	198.3	210.7	213.9	200.9
2025	201.6	211.5	213.8	202.0

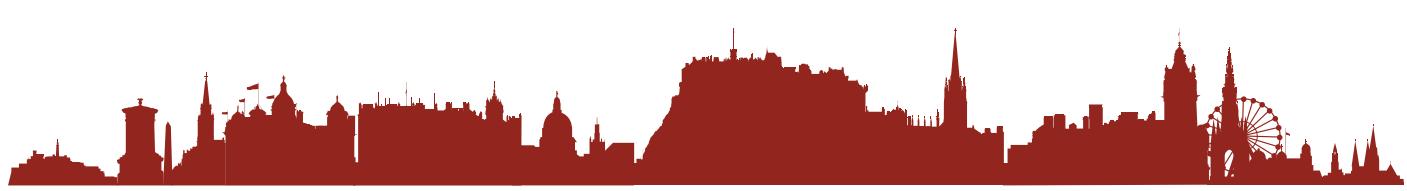
Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
EH3	3.6%	3.8%	4.0%	4.7%	4.8%
EH7	5.0%	5.1%	5.5%	6.5%	6.3%
EH8	6.6%	6.4%	6.8%	8.2%	8.5%
EH9	4.7%	4.8%	5.2%	5.4%	6.3%
EH10	3.8%	3.9%	4.0%	5.0%	4.7%
EH11	5.6%	5.3%	5.6%	6.5%	7.0%
EH12	4.7%	4.6%	5.0%	5.8%	5.8%



Beata Lozyniak - 1LET

"Edinburgh's rental market this quarter remains broadly stable. Strong demand continues for 1 and 2 bed flats which are letting quickly at steady rental levels. Larger properties are seeing downward adjustments in rents or longer times to let. Landlords of larger homes may need to adjust expectations on yields and vacancies. After a period of aligning rents with the open market, rent reviews are no longer driving sharp increases and we are now experiencing stability and a more balanced environment."

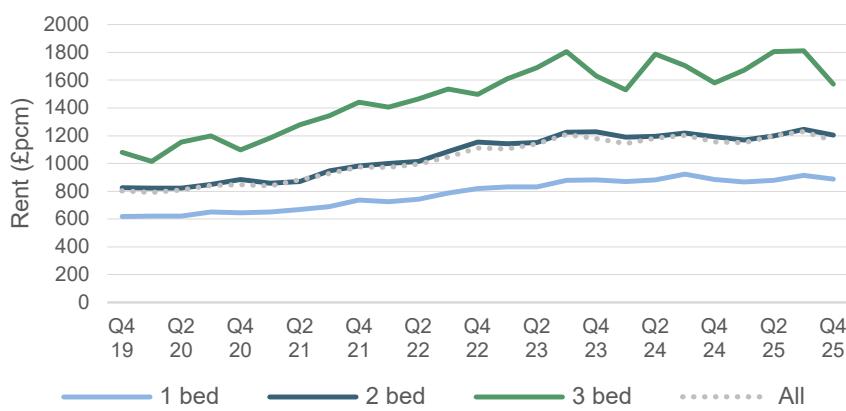


Glasgow

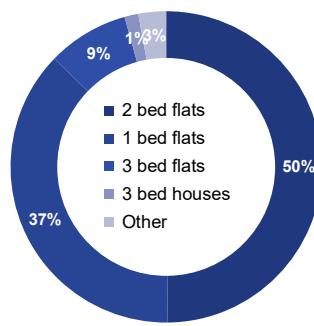
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£889	0.3%	38.0%	67.4%	19	1	27%	80%
2 bed	£1,205	1.1%	36.0%	67.1%	25	0	16%	68%
3 bed	£1,571	-0.6%	43.2%	61.3%	33	4	11%	53%
4 bed	£2,137	8.6%	25.9%	70.1%	45	-5	10%	40%
All	£1,164	0.6%	37.4%	66.0%	24	1	20%	70%

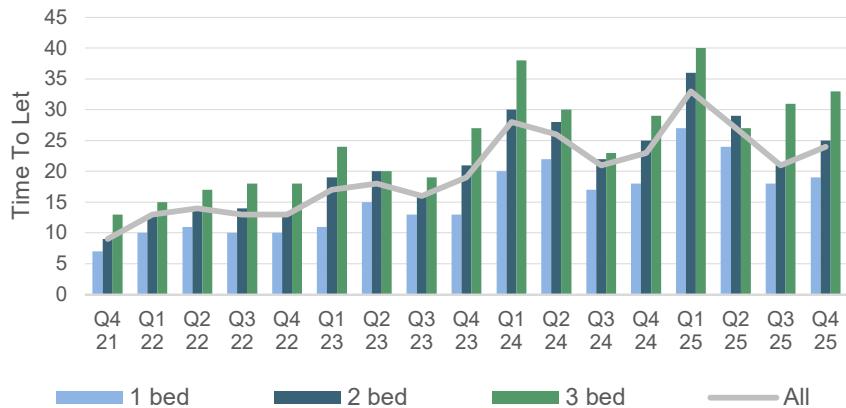
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	110.8	115.7	118.0	118.7
2015	119.8	120.8	120.6	123.6
2016	125.2	126.8	129.3	128.6
2017	130.5	133.2	131.9	130.9
2018	132.1	134.6	138.4	136.0
2019	136.2	140.9	141.6	141.4
2020	139.7	142.9	148.3	149.4
2021	147.8	155.6	163.7	172.0
2022	171.4	175.8	184.3	195.9
2023	194.9	201.2	213.1	207.9
2024	201.8	208.6	212.0	204.1
2025	202.8	211.5	216.9	205.3

Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
G1	5.8%	6.2%	7.1%	8.1%	7.8%
G2	5.9%	6.6%	8.9%	9.9%	9.0%
G3	5.3%	5.0%	5.8%	6.4%	6.3%
G4	5.9%	6.0%	6.3%	7.8%	8.0%
G5	6.4%	6.7%	6.8%	8.0%	7.4%
G11	5.2%	5.3%	5.7%	6.5%	6.2%
G12	4.2%	4.5%	4.7%	5.0%	5.3%



Ross Macleod - Macleod Lettings

"Glasgow's PRS remains highly constrained. Rental supply is limited following continued landlord withdrawals linked to rent controls, increased compliance costs and higher interest rates. Demand remains exceptionally strong, particularly in the City Centre and west end, driven by students, young professionals and in-migration. Rents are still rising, though at a slower pace, with competitive bidding common for well-presented 1 and 2 bed flats. Tenant affordability is increasingly stretched, leading to longer tenancies and reduced mobility. Uncertainty surrounding future Scottish housing legislation continues to suppress new investment and stock growth."



Aberdeen

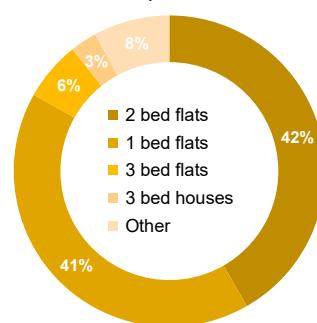
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£569	1.1%	22.4%	-7.8%	31	11	11%	59%
2 bed	£817	0.2%	25.3%	-7.9%	35	9	11%	54%
3 bed	£1,154	1.2%	29.1%	-4.9%	47	11	11%	36%
4 bed	£1,707	6.0%	18.5%	0.3%	47	-20	4%	35%
All	£891	1.7%	25.7%	-4.6%	35	8	11%	54%

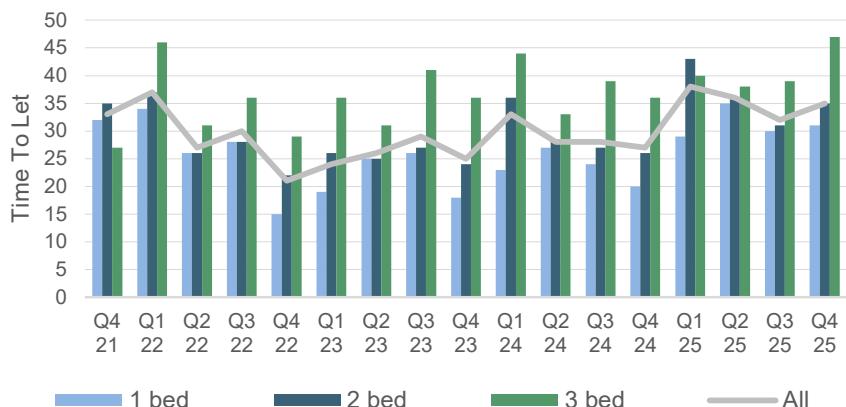
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	120.5	122.5	120.6	125.4
2015	123.1	117.9	112.4	105.5
2016	97.7	93.9	93.7	89.2
2017	86.8	89.0	87.5	85.3
2018	83.2	83.6	84.2	80.8
2019	80.2	82.9	80.9	80.0
2020	79.3	78.6	80.7	80.1
2021	79.0	79.9	80.8	80.7
2022	81.7	83.4	87.2	88.8
2023	90.2	94.4	94.0	97.5
2024	97.6	100.1	98.2	99.0
2025	97.5	99.8	100.2	100.7

Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
AB10	5.3%	5.3%	6.0%	7.2%	7.7%
AB11	6.2%	6.1%	6.6%	8.3%	8.4%
AB15	5.2%	5.4%	5.5%	7.0%	6.3%
AB24	7.3%	7.4%	8.2%	9.9%	9.9%
AB25	5.6%	5.8%	6.7%	7.9%	8.4%



Ross Watt - Grouse Lettings

"The Aberdeen market has, as expected, slowed somewhat as we enter the winter period, however rents remain strong and we are still seeing high levels of activity at the low to medium rent bands. While purchase prices have not recovered as quickly as rental yields, this means that we have seen lots of new landlord entrants to the North East market, many of whom are earning double digit percentage returns on their investments. As 2026 dawns we expect an immediate quickening in the market that will increase towards its usual summer crescendo."

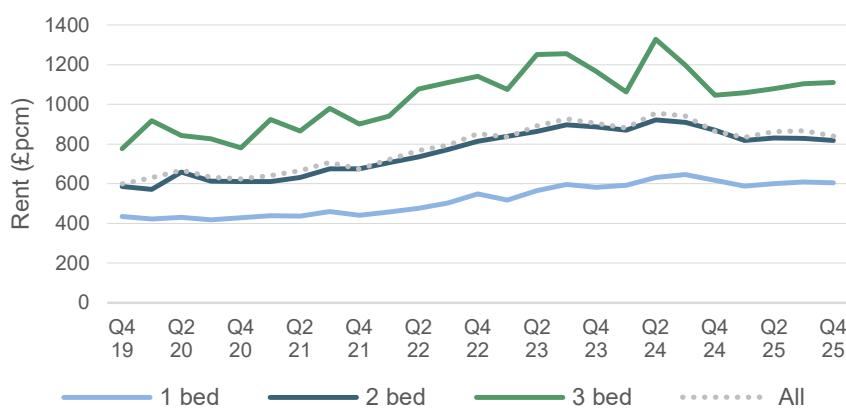


Dundee

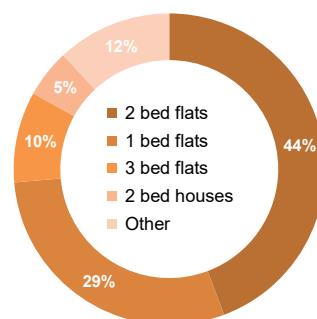
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£605	-1.9%	41%	53%	30	9	15%	62%
2 bed	£818	-6.1%	34%	48%	31	2	22%	58%
3 bed	£1,110	6.0%	42%	57%	57	17	10%	41%
All	£840	-2.8%	34%	47%	36	5	19%	56%

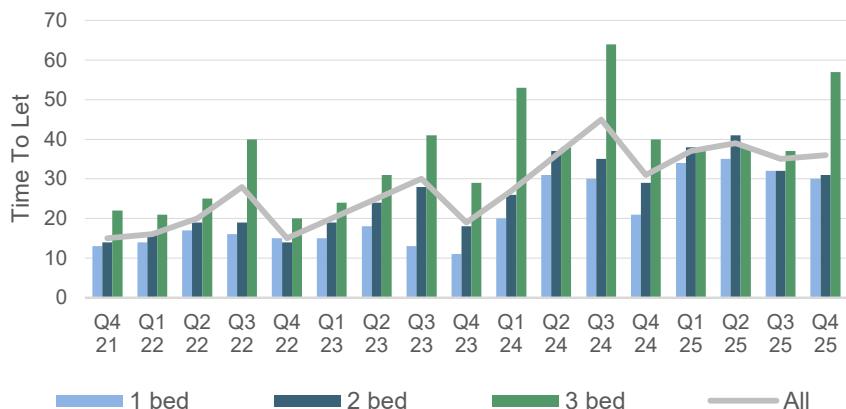
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 10)

Year	Q1	Q2	Q3	Q4
2014	103.3	97.4	98.4	94.6
2015	101.9	103.8	99.7	99.0
2016	107.6	104.0	102.4	103.6
2017	105.9	104.7	101.4	95.8
2018	106.6	107.3	104.9	100.3
2019	107.6	106.9	109.9	104.2
2020	109.4	116.0	109.9	108.5
2021	111.5	115.5	122.7	117.2
2022	125.3	133.2	137.8	148.1
2023	145.0	154.7	161.1	156.9
2024	153.1	166.1	163.5	150.0
2025	144.8	149.7	150.5	145.8

Yield by Popular Postcodes (Flats)

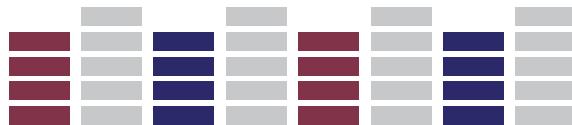
	2020	2021	2022	2023	2024
DD1	6.7%	7.1%	8.9%	9.5%	9.0%
DD2	6.3%	6.3%	7.6%	9.0%	8.9%
DD3	7.3%	7.1%	8.4%	9.5%	10.2%
DD4	7.0%	7.0%	8.8%	11.0%	10.3%
DD5	4.5%	4.5%	4.8%	5.8%	5.2%



Eilidh Finlayson - Finlayson Gore

"Q4 saw an unseasonal burst of activity with tenants securing property well into December and a string of leases starting the minute January begins. This has nicely rounded off a rollercoaster year for landlords, letting agents and tenants alike. The announcement from the Bank of England advising of a further cut to interest rates, reducing to the lowest since early 2023, will be welcome news to existing investors and should pave the way for 1st time landlords looking to enter the sector. Fierce demand for all types of property has remained high during the quarter and we anticipate this will continue into Q1 of 2026."





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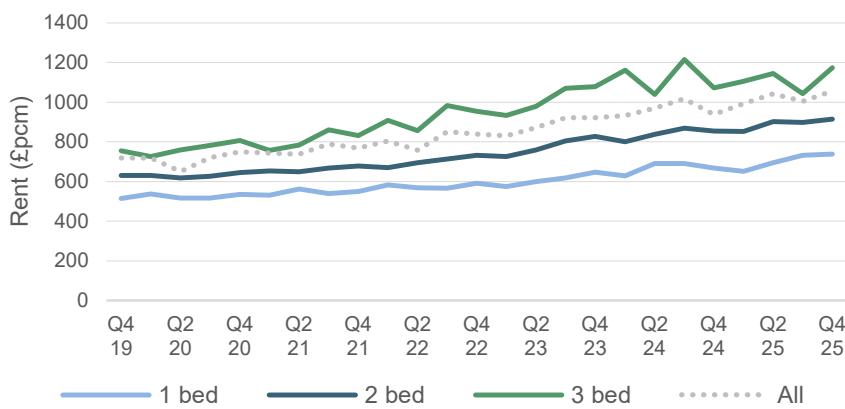
citylets.co.uk/podcasts

West Lothian

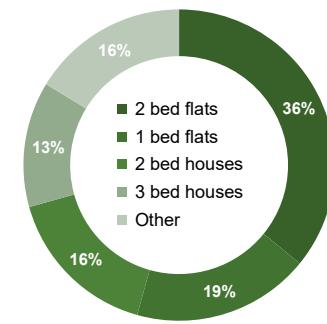
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£737	10.5%	37.8%	59.9%	21	-4	29%	81%
2 bed	£914	6.9%	41.7%	60.9%	23	8	19%	67%
3 bed	£1,173	9.5%	45.5%	65.0%	36	10	0%	40%
All	£1,057	12.6%	40.9%	65.7%	25	4	18%	67%

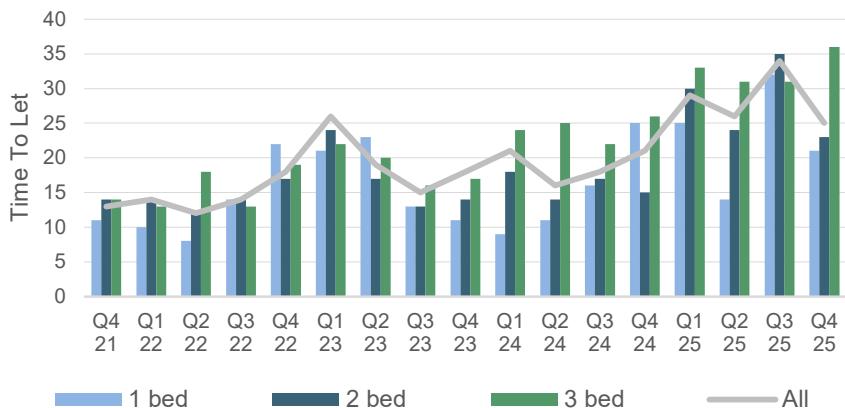
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	103.3	103.6	105.2	104.1
2015	105.9	105.7	107.9	110.0
2016	107.4	112.4	113.3	115.3
2017	113.1	112.9	114.7	114.7
2018	118.3	117.6	120.0	120.5
2019	122.4	115.0	122.6	124.0
2020	124.0	112.1	124.1	129.3
2021	128.3	126.9	136.0	132.6
2022	138.4	130.5	146.7	144.5
2023	143.1	150.2	159.0	159.0
2024	160.5	167.1	175.3	161.9
2025	170.9	179.7	173.3	182.2

Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
EH48	7.0%	6.8%	6.8%	7.2%	7.7%
EH49	5.2%	4.8%	4.1%	5.6%	5.2%
EH54	6.7%	6.7%	6.8%	7.0%	7.7%



Alan Henderson - Mavor & Company

"The final quarter of the year has seen a welcome shift away from the usual pre-Christmas slowdown. Enquiry levels for rental homes have been stronger than we would typically expect at this time of year, making for a pleasing end to 2025 and an encouraging outlook for 2026. News of the Scottish Housing Bill and forthcoming EPC changes has been met with largely stoic acceptance by landlords and, so far, we have not seen any consider leaving the sector. This gives us confidence heading into the New Year."

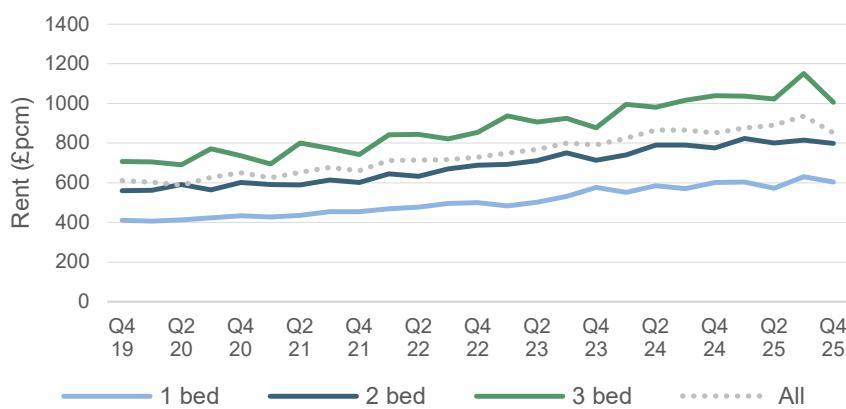


South Lanarkshire

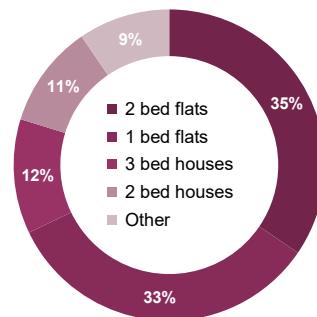
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£604	0.5%	39.5%	61.1%	12	-1	57%	89%
2 bed	£798	3.0%	32.6%	58.6%	32	13	13%	58%
3 bed	£1,005	-3.2%	36.7%	53.9%	22	-4	13%	75%
All	£851	-0.1%	30.9%	50.6%	24	5	29%	71%

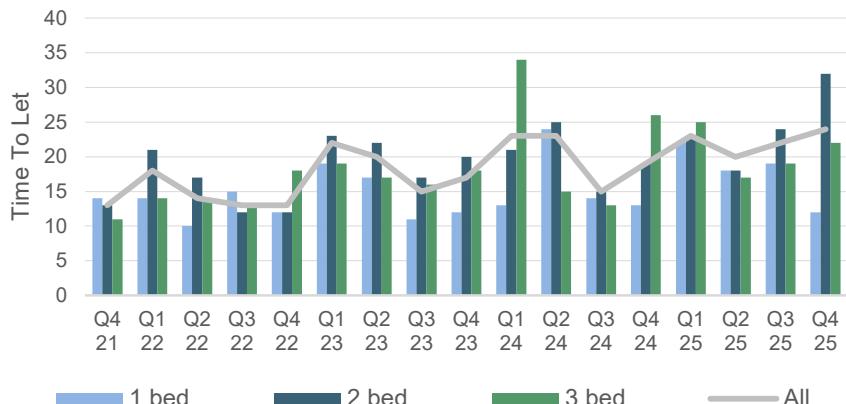
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



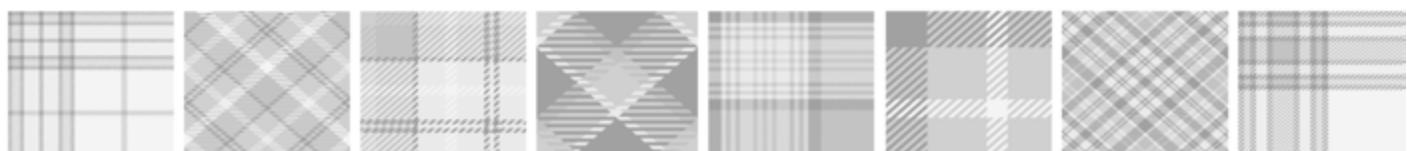
Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	95.9	103.1	104.1	95.6
2015	101.8	104.1	102.4	104.1
2016	101.1	105.3	108.3	105.3
2017	106.3	106.4	105.5	109.2
2018	107.0	110.7	107.6	106.3
2019	109.4	111.0	112.3	112.5
2020	111.0	108.1	115.5	119.7
2021	115.1	120.3	124.7	121.5
2022	131.1	131.7	132.0	134.1
2023	137.9	141.4	147.3	145.7
2024	151.7	159.5	159.3	156.9
2025	161.1	164.1	172.2	156.7

Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
G71	4.9%	6.1%	5.5%	5.9%	5.3%
G72	7.4%	8.2%	7.7%	9.0%	8.2%
G73	6.6%	6.5%	7.1%	7.2%	8.0%
G74	6.7%	6.6%	7.1%	8.1%	8.2%
G75	7.9%	8.0%	7.9%	9.1%	9.2%

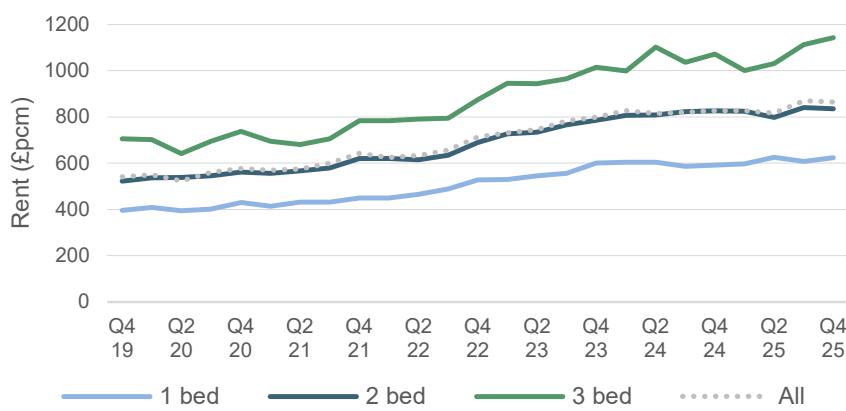


Renfrewshire

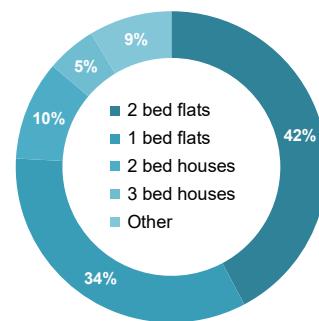
Market Overview - Q4 25

Beds	Average Rent	Rent Change 1yr	Rent Change 5yrs	Rent Change 10yrs	Av. TTL (days)	TTL Change YoY	Let within a week	Let within a month
1 bed	£624	5.6%	45.1%	68.2%	14	1	29%	90%
2 bed	£835	1.1%	48.6%	74.0%	24	5	13%	72%
3 bed	£1,142	6.5%	54.7%	70.7%	43	21	0%	40%
All	£864	4.5%	50.0%	72.8%	23	5	17%	74%

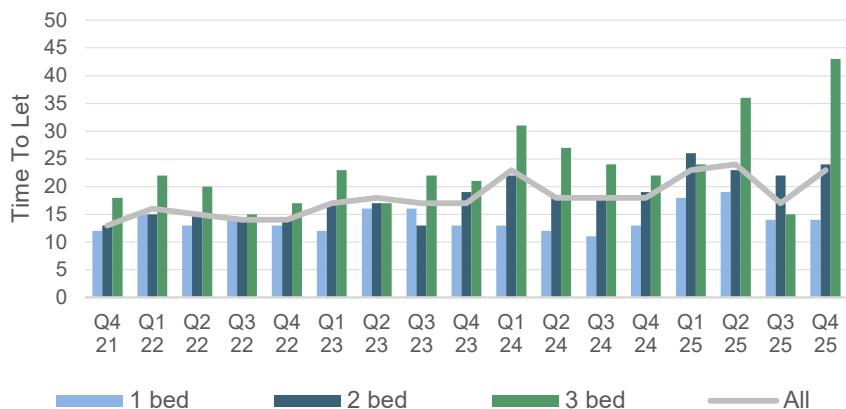
Average Rent (pcm) by Number of Bedrooms



Market Composition



Average Time To Let (TTL) by Number of Bedrooms



Rental Index

(base: Q1 08)

Year	Q1	Q2	Q3	Q4
2014	100.6	98.1	103.8	104.0
2015	100.2	108.6	105.5	104.8
2016	107.5	107.5	106.1	108.2
2017	102.9	108.6	111.3	110.3
2018	107.1	110.9	110.7	109.2
2019	109.0	112.8	114.3	113.4
2020	115.3	109.9	117.6	120.8
2021	119.5	120.3	125.8	134.6
2022	130.8	132.7	137.7	149.5
2023	153.2	156.2	164.2	167.3
2024	173.4	170.6	171.9	173.4
2025	173.4	171.3	182.2	181.1

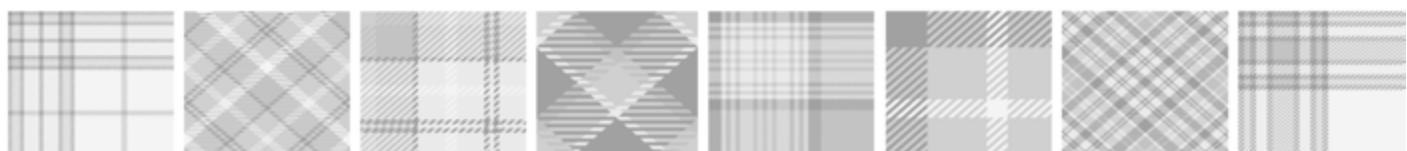
Yield by Popular Postcodes (Flats)

	2020	2021	2022	2023	2024
PA1	7.4%	7.3%	7.5%	9.0%	8.9%
PA2	6.4%	6.6%	7.4%	8.9%	8.0%
PA3	8.4%	8.4%	8.7%	10.6%	11.2%
PA4	7.7%	7.3%	7.4%	8.7%	8.8%
PA5	8.2%	7.8%	7.3%	8.6%	9.5%



Jacqueline McLelland - Castle Residential

"Renfrewshire remains extremely buoyant in Q4. Demand is strong for all types of properties, surprisingly with no strong favourite, and more rural locations seem to be in extremely high demand which in years past wasn't the case. There appears to be no preference for furnished or unfurnished properties, as both types are moving extremely quickly, reflecting a high demand in the market. Elevated borrowing costs may shape affordability and rental trends as the year progresses and time will tell in December if this will have any reflection upon the market."



Agent Views

Scottish letting agents give us their views on their local market.

Northwood, Aberdeen – Matt Pullinger



"Q4 has seen overall a steady rental growth despite all ongoing issues being faced in the North-east. Tenant demand has been at a consistent level throughout the year and Q4 with most well-presented properties achieving early activity and applications. Aberdeenshire continues to see a higher level of demand than supply currently and prices continue to increase as a result."



One Stop Properties, Glasgow – Wendy Fuller



"In the last quarter, the market has slowed down with tenant demand. We have an increased stock of properties compared to this time last year. Tenants are beginning to take notice of the rental market and are invested in The Housing (Scotland) Bill. We have noticed the less expensive properties are renting quicker than properties over £1000 per month. Landlords are continuing to leave the rental market albeit at a slower pace, due to the onerous costs of regulation. We are optimistic that the new younger generation of landlords are entering the market and are keen to start their investment journey with the help of an experienced letting agent."

iERO, Edinburgh – Matthew Wilcken



"Q4 2025 rounds off an excellent year for the newly rebranded iERO (formerly The Flat Company) within Edinburgh's resilient lettings and sales market. In line with Citylets data, we have seen our rents in Edinburgh continue to rise with average TTL remaining under three weeks, reflecting sustained tenant demand and limited supply. Festival rentals again delivered exceptional results for increased income and minimising void periods. Looking ahead to 2026, we are highly optimistic about continued success across sales, residential lettings and festival rentals in Scotland's strongest property market."

Cox & Co., Edinburgh – Mike Erskine



"In Q4 2024 I noted we didn't have a seasonal slowing and Q4 2025 is no different. We have had a huge quarter in terms of bringing in new stock and have recorded some of our best months in terms of revenue. The pace of turnover of tenancies is continuing with a number of people moving on over the festive period. The historic battening down of hatches for Christmas doesn't seem to be happening as people maintain a more fluid lifestyle. Maintaining our strong core has allowed us to manage this with gusto and we are looking forward to 2026 and the challenges it will bring."

Clan Gordon, Edinburgh – Hannah Doig

 "The Edinburgh property market in Q4 has seen a notable oversupply of properties. This could be a knock on effect of the council's decision to grant 6 week short-term temporary licences to landlords during the summer months to accommodate tourist demand. This influx of properties has shifted the balance of supply, yet rents remain resilient. Despite this, many landlords are reassessing their positions in the market influenced by new legislation preventing landlords from refusing tenants with pets, the potential introduction of rent controls and wider uncertainties surrounding future regulatory changes."

A Flat In Town, Edinburgh – Sally Williams

 "This quarter we've seen several of our landlords returning to the rental market after leaving to try and sell their properties, finding the sales route far slower and more challenging than expected. Instead of sitting with empty properties, they've chosen to re-let as a positive alternative. Rental demand in Edinburgh has remained consistently strong giving confidence that returning to the sector is the safe and sensible option for now. For us, it's been a steady and reassuring end to the year. We've been pleased to help familiar faces get their properties back on the market smoothly, successfully let again and see some steady income return to their pockets."

DJ Alexander, Aberdeen – Cathy Clark

 "Aberdeen's rental market has moved into a more balanced position through Q4. Supply has tightened from the oversupply seen in recent years while demand has remained steady, particularly for 1 and 2 bed flats. This has created a more stable environment for landlords. Rents remain lower than in other major Scottish cities, supporting affordability and underpinning investor interest. However, the recent budget offered no relief for the North Sea sector with the Energy Profits Levy unchanged and job losses continuing to weigh on sentiment. Despite this, cautious optimism remains for 2026 should policy shift."

Rettie & Co., Edinburgh – Karen Turner

 "With 2025 drawing to a close it is a good time to reflect on the past year's market. It was a slow start to the year and it took a while to start motoring. Interest levels were strong in the spring/summer and early autumn periods over most price points with demand strong for 1 and 2 beds and family properties. We saw an early tapering off in October. Lets still happen but we do see a softening of rent levels being achieved now in order to get some properties over the line as the demand is just not at the peak point of earlier in the year."

Glenham Property, Edinburgh – Charlie Inness

 "The Edinburgh market continues to be slow. After several years of intense rental inflation driven by supply shortages we're now seeing a gradual narrowing of the supply-demand gap. This shift is beginning to ease the pace of rental price growth. Affordability remains a critical issue for tenants, which naturally limits the scope for aggressive rent hikes. Looking ahead, we expect to see steady but lower levels of rental inflation more in line with historic norms rather than the volatility of recent years. For investors, this environment offers an opportunity to focus on portfolio resilience looking at energy efficiency, compliance and tenant experience which we feel are key differentiators in a market that is becoming more competitive and regulated."

Rentlocally.co.uk, Edinburgh – Lyndsay Yuill

 "The market is following the normal pattern of seasonal slowdown as many tenants do not want to move over Christmas. Rents remain strong and have increased again across the board in 2025, however there is always a seasonal dip where rents come down slightly at this time of year and time to let increases as competition decreases. The new housing bill will now start filtering into the lettings market with further pressure being put on the First-tier Tribunal system, but it will provide tenants with more rights. Landlords should educate themselves on the new bill to ensure they are compliant."

Martin & Co, Aberdeen – Eduardo Prato

“With the natural seasonal reduction in activity compared with Q3, Q4 2025 was still a very busy quarter, particularly in October. Demand remained higher than supply, which helped to keep rent levels up while stock shrank by 20% by the end of the quarter. This was particularly evident in the two-bedroom market. We expect this to shift again towards three and four-bedroom properties in 2026, as families start to look for places to move in the first half of the year. Landlords have adapted to the market, offering higher-quality properties which in turn has helped contribute to an overall increase in rents over the year.”

Watt Property, Edinburgh – Pauline Smith

“Our team have seen a notable shift in stock levels this quarter with more landlords than any other year now choosing to sell investment properties, reducing long-term rental stock and increasing tenant enquiries for new homes. A high volume of our tenant enquiries are now from those who have been served Notice to Leave due to their landlord selling, which seems to be a direct effect of the introduction of the Housing Bill and more legislative changes being placed on residential tenancies. This contraction is tightening stock levels across the city and keeping demand strong, which can only mean that rents are likely to continue to rise in 2026.”

Glasgow Property Letting, Glasgow – Colin Macmillan

“Q4 has seen a general slowing of the PRS market in Glasgow with less stock available in prime residential areas. Rental affordability is being squeezed in traditional hotspots, pushing prospective tenants to outlying areas with good transport links where travel costs are now a significant consideration. The city remains popular with students with parents paying premium rents for access to key institutions. Tenants are focusing more on total running costs and EPCs are central to decisions. We are also working with a major shipbuilder seeking staff accommodation within 20 minutes of the shipyards, boosting demand in outlying areas aided by the new Renfrew bridge.”

The Property Letting Centre, Edinburgh – Nick Milne

“Q4 2025 was a pivotal quarter for the sector, with The Housing Act receiving Royal Assent and the fourth and final Bank of England interest rate reduction of the year, to 3.75%, being announced. It is thought the base rate will reduce further over 2026, presenting opportunities for both existing and new landlords. The market remained buoyant despite the usual winter slowdown. The student sector was affected by an oversupply of purpose-built student accommodation, although demand for traditional tenement student properties remains high, with weaker demand over the winter months. While the Act brings greater tenant rights, the market remains strong. Following several unpredictable years, 2025 showed more consistent trends, which should support portfolio growth and help attract new landlords.”

Cullen Property Ltd, Edinburgh – Steve Coyle

“The final quarter of 2025 saw Edinburgh’s PRS market stabilise after a year of mixed signals. Demand remained resilient, particularly for 1 and 2 bed properties, which continued to outperform larger homes. Improved supply, driven by regulatory changes and new landlords bringing stock to the market, eased some pressure but rents held firm, reflecting ongoing affordability challenges. While annual growth has moderated from the highs of recent years, the market retains strong fundamentals, supported by Edinburgh’s vibrant economy and student demand. Landlords are increasingly focused on providing a quality product, with energy efficiency and competitive pricing, to secure quality tenants in a more balanced landscape. Overall, Q4 closed on a note of cautious optimism, with signs of normalisation after prolonged volatility. We go into 2026 in good shape.”

Have Your Say!

If you'd like to contribute to forthcoming issues please contact info@citylets.co.uk

Postcode & Towns - Average Rents & TTL - Q4 25

Landlords and Letting Agents continue to require timely, accurate data to help them value rental properties in a variety of locations. At Citylets, robust information is paramount so we only include rents for postcode districts where there is substantial quarterly volume.

Edinburgh - £pcm (TTL days)

Postcode	1 Bed	2 Bed	3 Bed
EH1	£1,170 (21)	£1,542 (38)	
EH3	£1,240 (21)	£1,711 (21)	£2,200 (40)
EH4	£1,168 (17)	£1,452 (29)	£1,521 (26)
EH5	£1,041 (26)	£1,256 (26)	
EH6	£1,049 (21)	£1,336 (25)	£1,762 (46)
EH7	£1,049 (17)	£1,374 (26)	£1,671 (37)
EH8	£1,032 (20)	£1,389 (22)	£1,723 (30)
EH9		£1,435 (26)	£2,015 (47)
EH10	£1,076 (27)	£1,552 (27)	£1,938 (39)
EH11	£970 (23)	£1,314 (28)	£1,551 (37)
EH12	£1,014 (14)	£1,378 (27)	
EH14	£925 (18)	£1,294 (21)	

Glasgow - £pcm (TTL days)

Postcode	1 Bed	2 Bed	3 Bed
G1	£970 (24)	£1,326 (28)	
G2		£1,283 (36)	
G3	£1,003 (24)	£1,444 (27)	
G4	£888 (13)	£1,231 (24)	
G5		£1,086 (28)	
G11	£912 (20)	£1,285 (21)	
G12	£961 (25)	£1,464 (23)	£1,818 (29)
G13		£1,020 (28)	
G20	£881 (23)	£1,141 (25)	
G31	£757 (15)	£1,070 (26)	
G32	£732 (17)	£911 (25)	
G40		£995 (24)	
G41	£830 (14)	£1,104 (30)	
G42	£864 (21)	£1,110 (27)	
G44	£785 (16)		
G51		£989 (25)	

Aberdeen - £pcm (TTL days)

Postcode	1 Bed	2 Bed	3 Bed
AB10	£578 (33)	£790 (37)	£1,114 (56)
AB11	£568 (32)	£785 (41)	
AB12		£824 (31)	
AB15		£1,063 (32)	£1,518 (54)
AB16		£746 (38)	
AB21		£780 (35)	
AB24	£546 (33)	£784 (43)	£977 (49)
AB25	£561 (37)	£746 (39)	
AB41		£745 (20)	

Dundee - £pcm (TTL days)

Postcode	1 Bed	2 Bed	3 Bed
DD1	£701 (35)	£942 (37)	
DD2	£600 (28)	£788 (38)	
DD3	£583 (37)	£709 (21)	
DD4	£586 (34)	£757 (18)	

Towns - £pcm (TTL days)

based on 12 month rolling average

Town	1 Bed	2 Bed	3 Bed
Bathgate		£859 (31)	
Bonnyrigg		£1,065 (18)	
Broughton	£1,074 (21)	£1,453 (31)	
Dalkeith		£1,043 (23)	
Dalry	£976 (23)	£1,335 (26)	£1,814 (30)
Dunfermline		£854 (19)	£1,168 (25)
East Kilbride	£596 (16)	£775 (16)	
Ellon		£731 (21)	
Hamilton	£572 (18)	£771 (20)	£1,133 (19)
Hillhead	£774 (11)	£1,388 (22)	£2,100 (19)
Hillside	£1,090 (19)		
Inverurie		£759 (28)	
Johnstone		£783 (25)	
Largs	£503 (17)	£708 (27)	
Livingston		£917 (25)	£1,159 (31)
Motherwell		£765 (25)	
Musselburgh	£905 (19)	£1,224 (22)	
Paisley	£613 (17)	£814 (25)	£1,108 (27)
Penicuik		£1,006 (21)	
Renfrew	£613 (13)	£861 (23)	
Rutherglen		£900 (32)	
St Andrews	£1,259 (23)	£1,581 (33)	
Stirling Town		£1,093 (17)	£1,570 (23)
Trinity	£1,054 (26)	£1,292 (25)	
Woodlands		£1,345 (25)	£1,824 (26)

Mid-Market and Build to Rent News

Lar Provides a Home Away from Home

Research has highlighted that Glasgow is one of the most difficult cities for students to find suitable accommodation. Lar, building on the success of its developments around the country, has completed first 25 properties at its site in Ruchill. A thriving new community is developing.

The development, known as The Quadrangle, is targeting students studying and working in the city who would otherwise not be able to afford to complete their courses. These include people studying nursing, law, engineering, finance and music.

Many students can only afford to study by taking on a job to supplement their student loan and in multiple cases it is more than one job. Indeed, a total of 76% of Lar's tenants at The Quadrangle development are also in some form of paid employment and some have overcome difficult personal circumstances, such as homelessness, to try and achieve their academic goals. These one, two and three bedroom homes are let on a PRT giving students the same rights and control as all other private tenants.

Rents have been set at £650 per month for a one bed flat and £450 per room for two and three bed properties.



The Quadrangle Development
(photo credit to John Pow)



BTR Mounting a Comeback?

As we end 2025, the Build to Rent (BTR) sector in Scotland may have had fresh life breathed into it again.

The new Housing (Scotland) Bill, just passed by Holyrood, exempted BTR and Mid-Market Rent from the Bill's provisions, including rent controls, which had caused new investment into the sector to flee the country when initially brought in as an emergency measure in late 2022.



Dr John Boyle, Director of Research, Rettie

For the first time since then, consultants like myself are working for the sector here again, examining potential sites and funding deals. But it remains slow.

The sector has viability issues created by the rising costs of construction and finance to deal with, as well as the political uncertainty. And once the investment taps are turned off (and the money flows elsewhere), it is not that easy to turn them back on.

Many funds continue to wait for the secondary legislation so that they are clearer around the nature of the exemptions. They may also be waiting to see the outcome of the Holyrood elections in May 2026.



For now, the pause remains, but there is a faint rumble of the engines restarting.

Mid-Market and Build to Rent News cont.

The BTR Viability Issue

Multi-family BTR remains largely unviable in Scotland. Even with an end to rent control, institutional investors are still electing to invest in English cities rather than in Glasgow and Edinburgh, due to more certainty and better viability.

In Scotland, if authorities want large scale private and affordable homes developed, there is an urgent need to review policy and regulations to help move BTR back to viability. That means, for example, reducing affordable housing levels (from 35% in Edinburgh) and reviewing the 20% three bed policy.

Across several BTR developments in Edinburgh, investors now have evidence that the policy requirement for 20% three bed units, "designed for growing families", is wholly inappropriate. The hard evidence, collected over the last 12 months, demonstrates unequivocally that demand for three bed units in multi-family developments is far lower than 20%: more like 5-10% at best. Families typically want a front door and a garden, which is generally not what multi-family BTR developments offer due to the higher density urban nature of the developments.

In a recent survey conducted by Scarlett, every institutional investor we spoke to confirmed that they would not invest in a BTR scheme in Edinburgh which required the provision of 20% three beds. Three bed units are the hardest to let and have the lowest occupancy rate. In the rare instance where occupied by a family, this is often a temporary measure, between buying and selling a house elsewhere.

The evidence tells a similar story across the UK. One major institutional investor, with a portfolio of over 5,000 BTR multi-family units, has only 1.4% of those units leased to families.

All Scotland MFH and SFH BTR schemes are on our interactive map:
<https://www.scarlettdev.co.uk/services/build-to-rent/pipeline-scotland/>



Will Scarlett - Founder/Director
Scarlett Land and Development

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CITYLETS
Home of Scottish Letting

Scottish Letting Day: Bringing Scotland's Letting Community Together

Policy, professionalism and practical insight from Scotland's largest PRS conference.

The Scottish Association of Landlords' award-winning Scottish Letting Day conference once again proved why it is the flagship event in Scotland's private rented sector (PRS) calendar. Held at the iconic Scottish Gas Murrayfield Stadium in Edinburgh, the conference welcomed over 650 landlords, letting agents, industry experts, guests, and exhibitors, making it the largest landlord and letting agent conference in Scotland.

Scottish Letting Day is renowned for delivering a diverse, high-quality programme that allows delegates to tailor the day to their own interests and professional needs. With multiple sessions running throughout the day, attendees were able to engage with topics most relevant to their role within the sector, ensuring practical learning, meaningful discussion, and real-world takeaways.

The programme covered a wide range of critical and timely issues facing the PRS, and delegates received a comprehensive PRS legal update, ensuring they remained informed about the evolving legislative landscape. Sessions on Making Tax Digital provided valuable insight into upcoming tax changes, while guidance on preparing for the First-tier Tribunal helped landlords and agents navigate disputes with confidence. A well-attended mortgage discussion panel offered expert perspectives on finance, lending trends and the challenges

facing property investors.

Professional development was a key theme throughout the day, with training sessions delivered by Landlord Accreditation Scotland supporting best practice and standards across the sector. Delegates also benefited from an insightful update on the Scottish housing market, offering data-driven analysis and forward-looking commentary on market trends. Meanwhile, Talking Deposits with SafeDeposits Scotland provided clarity on compliance, responsibilities, and dispute resolution.

The conference concluded with a highlight of the day: the conference debate special. Chaired by respected TV presenter and broadcaster Stephen Jardine, the lively panel brought together voices from across politics and local government, including Paul McLennan MSP, Meghan Gallacher MSP, Councillor

Pauline Flannery, Councillor Ross Lambie and SAL chief executive John Blackwood. The debate offered robust discussion, differing perspectives, and thoughtful insight into the future of housing and the PRS in Scotland. For those unable to attend or wishing to revisit the conversation, the session is available to view on episode six of SAL's podcast, *Landlord Voice*.

Above all, Scottish Letting Day showcased the strength and collaboration of Scotland's letting and housing community. Professionals from every corner of the industry came together to share ideas, learn from one another, and play their part in shaping a sustainable, professional, and forward-thinking PRS. The event once again demonstrated SAL's commitment to leadership, education and bringing the sector together - making Scottish Letting Day a truly standout conference in Scotland's housing calendar.



Conference debate special, Scottish Letting Day 2025 (photo by MoneyBee Media)

Edinburgh's Property Market Cools Slightly After an Active Year

September-November 2025 presented mixed results, yet competition still remains popular.

As expected, the housing market eased slightly from September to November, as is typical for this time of year. Even so, average selling prices across Edinburgh continued to perform strongly, reflecting robust buyer demand during a season that is traditionally quieter.

The average property selling price for Edinburgh rose 3.5% year-on-year, to £316,063. The South West of the city retained its place as the most expensive place to buy a property, at £395,857, while the West of Edinburgh was by far the most affordable, with an average price of £218,852.

The most affordable property was one-bedroom flats in Gorgie, with an average selling price of £154,260. Offering a convenient location, excellent transport links and lower property prices, alongside proximity to universities, Gorgie continues to appeal to investors, students and first-time buyers looking for an affordable property in the city.

Buyers continued to secure properties closer to their Home Report valuation, with homes achieving 101.8% of their Home Report valuation on average, just 0.2 percentage points down on last year. Properties in Edinburgh East commanded the highest premium at 102.8% of their Home Report valuation, despite a year-on-year decline of 1.3 percentage points.

Sales volumes decreased 4.9%

year-on-year, once again hinting that the market is more cautious in the current financial climate. Despite a slight decrease in comparison to this time last year, Leith and Corstorphine both recorded the highest number of sales in Edinburgh. Elsewhere, South Queensferry was a standout performer, with 36.1% more sales than last year. The increase in sales volumes for three and four-bedroom homes was especially high, reflecting growing buyer demand for spacious

three days slower than last year. Additionally, 23.8% of properties went to a closing date, a drop of 1.0 percentage points compared to last year, combined with stable average selling prices and relatively consistent selling times, this indicates that sellers are pricing their homes realistically, creating conditions that allow buyers to act sensibly and submit well-considered offers.

Paul Hilton, CEO of ESPC, said: "The property market across Edinburgh has demonstrated remarkable resilience during what is typically a quieter period, with strong year-on-year growth reflecting the sustained momentum we've seen throughout the latter half of 2025. The market dynamics tell an interesting story about buyer behaviour. Properties are taking slightly longer to sell, and we've seen fewer closing dates compared to last year. Rather than viewing this as a negative, I see this as a sign of a maturing, more balanced market where buyers are taking time to make considered decisions and sellers are pricing realistically."

This article was written in December 2025 and property market activity may have changed by the time of reading.



ESPC's Property Lounge on George Street

family homes with great commuter links to the capital.

In terms of new properties coming on to the market, there was an 8.9% decrease in comparison to September-November 2024. However, Leith and Corstorphine also recorded the most insertions, despite a decrease of 29.1% and 28.7% respectively.

Properties in Edinburgh had a median selling time of 24 days,

ESPC advertise thousands of properties through their website, weekly paper and information centres, offering unrivalled knowledge and expertise from their own team and member solicitor estate agents.

espc.com | facebook.com/espc.property | X: @espc

EPC and MEES Reforms: Key Updates for the Private Rented Sector

EPC overhaul in 2026

In October 2025, the Energy Performance of Buildings (Scotland) Regulations 2025 were approved. These Regulations propose to modernise the EPC system with effect from 31st October 2026. The new framework provides that:

- Certificates will be valid for five years (reduced from 10)
- EPCs will take a redesigned format and will display information according to new metrics:
 - a Heat Retention Rating (HRR): a scale rating from A to G to demonstrate how well-insulated the property is
 - a Heating System Rating: showing current and potential emissions category of the main heating system, thermal efficiency and running costs
 - an Energy Cost Rating: based on the cost of energy to run the home to standardised conditions

Transitional provisions

A one-year period between 31 October 2026 to 31 October 2027 will be permitted, during which time an existing valid EPC can be used for one re-let only. If a property is re-let twice in the transitional period, an EPC compliant with the 2025 Regulations will be required.

Minimum Energy Efficiency Standards (MEES): EPC rating C by 2028

Alongside reformed EPCs, the Scottish Government has announced mandatory Minimum Energy Efficiency Standards (MEES) for private tenancies which are likely to be introduced by the Energy

Efficiency (Domestic Private Rented Property) (Scotland) Regulations 2026. The Regulations, currently in draft - are expected to be laid before the Scottish Parliament in early 2026.

Implications of draft regulations:

It is expected that from 1st April 2028, all new tenancies must meet HRR band C, with existing tenancies to reach the same standard by 2033.

From those dates landlords would be prohibited from letting properties which do not obtain the new EPC HRR band C, unless all energy efficiency measures identified in the EPC have been made or the property is exempt.

Exemptions?

Local authorities will be responsible for enforcing these provisions and will be required to establish and maintain an exemption register (the PRS Exemption Register). They will also have the power to impose both financial and publication penalties on landlords who have not complied with the minimum standards.

Landlords can apply for exemptions in the following circumstances:

- Where the tenant has refused consent to any energy efficient improvements being made, or the landlord has been unable to obtain consent despite reasonable efforts
- Where the landlord has obtained a written opinion from a relevant person advising of negative impact on the fabric/structure of property, such that it is not appropriate to make improvement
- Where the cost of making any relevant energy improvements exceeds a specified sum

To exercise any exemption the landlord must have registered the relevant information with the PRS Exemption Register.

The regulations are still in draft form and it may be that changes are made prior to the effective date. Nonetheless, landlords are encouraged to ensure they are adequately prepared for the forthcoming changes by reviewing existing EPCs, diarising when a new certificate is likely to be required and familiarising themselves with exemptions and energy efficiency improvement measures.

For guidance on the new EPC rules and compliance, contact TC Young, we're here to help.



TC Young's PRS Experts

SafeDeposits' API is Go!

Client Relations Manager Frankie Bishop on the latest development in streamlining deposit protection.

2026 is set to be the year of the API for SafeDeposits Scotland as we build on the successful launch of our interface last year and work with a host of partners to harness technology and streamline deposit protection for our customers.

There have been huge digital advances in property management, with letting agencies using a variety of lettings software and CRM products to provide their landlord and tenant customers with the best service possible. Our API is our contribution and our commitment to supporting that service, and making life easier for agents too.

The function of our API is to securely connect the SafeDeposits Scotland database with software and CRM products so that agents can transfer tenancy deposit registration details at the click of a button. This saves entering details into different fields multiple times, a boost in particular for larger agencies, build-to-rent operators opening new developments and indeed any lettings business that deals with seasonal peaks such as the run up to the new academic year.

The SafeDeposits API is available to customers of SafeDeposits Scotland, and we welcome any enquiries about integration. Agents can have a chat with our Client Relations team and find out if their software provider is already linked

up to the SafeDeposits API, or if an integration is in the pipeline.

If your provider is not currently integrated with the SafeDeposits API, fear not. Simply let them know you would like to benefit from the API, copying in our API team, and we can take things from there on your behalf.

In 2025 we were delighted to launch our first API integration with a CRM



Frankie Bishop, Client Relations Manager at SafeDeposits Scotland

provider which, like ourselves, is based right here in Scotland. A number of Scottish letting agents who use Edinburgh-based SME Professional's CRM are already reaping the benefits of integration with the SafeDeposits API. Those benefits include not only the enhanced service for their customers as mentioned, but also savings on time and operational expenditure, and support with compliance.

We are excited to have made our API available to Scotland's letting industry, and have more partners integrating with us soon. This is our latest step forward in technology, with more developments to come. In 2022 we launched a completely new system and website, bringing with them a host of new features to make deposit protection easy for our customers. And in 2024 we introduced tlyfe, the app that simplifies the renting process for tenants and delivers rent-ready tenants to agent and landlords.

Citylets Research Services

The Citylets research team produces market-leading reports and indices as well as bespoke research and consultancy projects for clients including letting and sales agents, developers, investors, housing associations and local and central government.

In Scotland, Citylets has become the leading authority on the private rented sector and has built up a strong reputation for well-informed insightful commentary, market analysis and is now a trusted media source on local and national rental issues.

In its position as the UK's leading residential lettings site, Citylets enables the research team to utilise its unique data in addition to Registers of Scotland and government data. **OptiletPro** is an analysis tool which delivers robust data on the sales and rental residential property markets at a local level. The interface is designed to allow clients to analyse local trends and easily extract data into a variety of formats.

Metrics include:

- Average rental price and monthly stock volumes by city/region, area, postcode district postcode sector
- Average time to let (TTL) by city/region, area, postcode district and postcode sector
- Analyse by property type and bedroom count

Methodology

The statistics are based on rental properties advertised on Citylets. Rather than employ snapshot sampling our observations are recorded when a property is removed from the site as let. We believe such transaction-based observations provide a better reflection of the market. The data is cleansed to remove multiple entries and other anomalies.

Our cleansing process continues to guide refinements to data recording. Averages are calculated on a monthly or quarterly basis as weighted (mix adjusted) means. Indices are constructed holding composition (property type and number of bedrooms) fixed at the average of the last three years. This ensures that changes in the index reflect rent changes and not changes in composition, which are likely to occur seasonally.

The Publication

This document was published in January 2026. Whilst we have made every effort to ensure information published in this report is correct, Citylets gives no warranty or representation as to the accuracy or completeness of the information. The report does not constitute legal or other professional advice. We reserve the right to change methodology, discontinue or revise indices or other analysis at any time.

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