Private Sector Rent Statistics, Scotland, 2010 to 2017

Main findings for average rent changes in the latest year (2016 to 2017)

- 15 out of 18 areas of Scotland saw increases in average 2 bedroom private rent levels between 2016 and 2017 (years to end Sept), ranging from 7.0% in Greater Glasgow to 0.7% in the Ayrshires. Rents for 2 bedroom properties in Aberdeen and Shire fell by 9.6%, the third consecutive annual decrease.
- These regional trends combine to show a 4.4% increase in average 2 bedroom monthly rents at a Scotland level from £616 in 2016 to £643 in 2017.
- At a Scotland level there were also increases in rents for 1 bedroom (4.0%), 3 bedroom (4.6%), 4 bedroom (4.9%) and 1 bedroom shared properties (3.0%).
- These increases compare to UK CPI inflation of 3.0% in the year to Sept 2017.

Main findings for average rent changes between 2010 and 2017

- Average rents have increased above the rate of inflation between 2010 and 2017 across all property sizes in both Lothian and Greater Glasgow.
- East Dunbartonshire, Fife, Forth Valley, and Perth and Kinross have seen average rents rise above the rate of inflation for 3 bedroom, 4 bedroom and 1 bedroom shared properties.
- Argyll and Bute, Dumfries and Galloway, and West Dunbartonshire have seen average rents rise less than the rate of inflation, or have seen average rents fall, for all property sizes between 2010 and 2017.
This publication presents statistics on private sector rent levels in Scotland over the years 2010 to 2017 (years to end-September) for different property sizes across each of the 18 Broad Rental Market Areas in Scotland. It contains information on average rents as well as rents at the higher and lower end of the market. The publication uses data from the Rent Service Scotland market evidence database, which is collected for the purposes of determining annual Local Housing Allowance levels and Local Reference Rent.

The rental information contained in the market evidence database is largely based on advertised rents, therefore it is important to note that the statistics presented in this publication do not represent rent increases for existing tenants.

It is also important to note that the data collected on individual rents may encompass different property types and addresses for each data collection year, and that this publication is not an attempt at providing a case-matched, tracked-sample or weighted-index approach to monitoring changes to rent levels over time. See Annex D for further information on methodological differences to the ONS Index of Private Rents.

**Main findings for 2 bedroom properties**

The most common type of property in the private rented sector is a 2 bedroom property, with almost half (47 per cent) of all private rented properties in Scotland estimated to be this size. Findings relating to other types of properties can be different to those for 2 bedroom properties, and information on them is provided later in this publication.

- From 2016 to 2017, all areas of Scotland, with the exception of Aberdeen and Shire, Argyll and Bute and West Dunbartonshire, have seen increases in rent for 2 bedroom properties. These ranged from 0.7% in the Ayrshires, up to 6.9% in Lothian and 7.0% in Greater Glasgow. Aberdeen and Shire saw a decrease of 9.6%, the third consecutive annual decrease, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. Decreases were also seen in Argyll and Bute (-1.7%) and West Dunbartonshire (-0.5%).

- These regional trends combine to show an increase of 4.4% in average rents for 2 bedroom properties from £616 in 2016 to £643 in 2017. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

- For the year to end-September 2017, Lothian had the highest average monthly rents for 2 bedroom properties across Scotland (£888). Other areas with high rents included Greater Glasgow (£745), Aberdeen and Shire (£682), and East Dunbartonshire (£653). Areas with the lowest average rents for 2 bedroom

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1. A definition and map of Broad Rental Market Areas is included in this publication in the Section on Broad Rental Market Area Profiles.
2. Information is provided on means, medians, lower quartiles and upper quartiles. These statistical terms are defined in Annex B – Glossary of Terms.
properties included Dumfries and Galloway (£453), Scottish Borders (£459), and the Ayrshires (£467).

- Figures on changes to rents over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17\(^5\). For example, over the 7 year period, average rents for 2 bedroom properties in Lothian and Greater Glasgow have risen faster than the consumer price index, whilst changes in average rents for 2 bedroom properties in other areas of the country have been below the rise in the consumer price index.

- These regional trends over the 7 year period combine to show a 19.9% cumulative increase in average monthly rents from £536 in 2010 to £643 in 2017 for 2 bedroom properties at the Scotland level.

The changes in average rents for 2 bedroom properties between 2016 to 2017, and 2010 to 2017, are illustrated in Figure A and Figure B, respectively.

\(^5\) ONS CPI Reference, published on 17 October 2017  
http://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/d7bt/mm23
Figure A: Change in average (mean) rents for 2 bedroom properties between 2016 and 2017.

Broad Rental Market Area
1. Aberdeen and Shire
2. Argyll and Bute
3. Ayrshires
4. Dumfries and Galloway
5. Dundee and Angus
6. East Dunbartonshire
7. Fife
8. Forth Valley
9. Greater Glasgow
10. Highland and Islands
11. Lothian
12. North Lanarkshire
13. Perth and Kinross
14. Renfrewshire / Inverclyde
15. Scottish Borders
16. South Lanarkshire
17. West Dunbartonshire
18. West Lothian

Percentage change in private sector rents
- Decrease
- Increase by 2% or less
- Increase more than 2%, less than 4%
- Increase more than 4%
Figure B: Percentage change in average (mean) rents for 2 bedroom properties between 2010 and 2017.

Broad Rental Market Area
1. Aberdeen and Shire
2. Argyll and Bute
3. Ayrshires
4. Dumfries and Galloway
5. Dundee and Angus
6. East Dunbartonshire
7. Fife
8. Forth Valley
9. Greater Glasgow
10. Highland and Islands
11. Lothian
12. North Lanarkshire
13. Perth and Kinross
14. Renfrewshire / Inverclyde
15. Scottish Borders
16. South Lanarkshire
17. West Dunbartonshire
18. West Lothian

Percentage change in private sector rents:
- Increase 5% or less
- Increase more than 5%, less than 10%
- Increase more than 10%, less than 15%
- Increase more than 15%
Aims and feedback
The aim of this statistical publication is to provide a detailed and user friendly presentation of private rental values, trends and distributions. The main users of this publication are likely to include those involved in housing policy and practice, researchers, tenants, landlords, letting agents, and other individuals with an interest in the private rented sector.

We welcome your views and feedback on the format and content of this publication, along with any suggestions for areas of improvements that could be made. Contact details are listed on the back page, or you can email us at housingstatistics@gov.scot.
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  Broad Rental Market Area Profile – Perth and Kinross .......................................................... 36
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**Background**

This publication uses data from the Rent Service Scotland ‘Market Evidence Database’. This database is used to meet the needs of determining annual Local Housing Allowance levels and Local Reference Rent, and data from it is also published in the form of 30th percentile rental prices\(^6\) at Broad Rental Market Area level. The market evidence data on private rents is sourced through a variety of means, including private landlord and letting agent returns, mailshot initiatives, as well as advertised rental information. In the latest year an estimated 97% of records were based on advertised rents, with the remainder being based on actual rents from landlord returns. Given the high proportion of records obtained from advertised rents, it is important to note that the statistics presented in this publication do not represent rent increases for existing tenants.

The rental values in this publication are based on data collected on about 25,000 to 28,000 individual rents each year, representing about 8% to 10% of private rented dwellings. It is important to note that the data collected on individual rents may encompass different property types and addresses for each data collection year, and that this publication is not an attempt at providing a case-matched, tracked-sample or weighted-index approach to monitoring changes in rent levels over time. See Annex D for further information on methodological differences to the ONS Index of Private Rents.

Caution is advised when considering rent levels and trends for property sizes within Broad Rental Market Areas which are based on small sample sizes.

This publication **does not present** rental values averaged across all property sizes for Broad Rental Market Areas or at a Scotland level. This is because changes to sampling proportions by property size within each Broad Rental Market Area over the years would introduce bias into overall averages when comparing trends over time. In addition, each Broad Rental Market Area has a different profile of rental properties by size, which would also distort overall comparisons between Broad Rental Market Areas.

This publication uses data from the Rent Service Scotland market evidence database, which:

- **excludes** any rents related to social housing, mid-market rents, halls of residence, and private tenancies known to be the subject of housing benefit and regulated tenancies.

In addition:

- Rental information on studio/bedsit properties, properties with 5 or more bedrooms, and bed and breakfast lodgings has been **excluded** from this publication due to small sample sizes.
- Rents for a **bedroom in a shared property** are presented as ‘rent only’ figures, i.e. do not include the additional cost of shared services where these are known.

Further details on the data collection methodology, including sample sizes and sampling proportions is given in Annex C.

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\(^6\) [http://www.gov.scot/Topics/Built-Environment/Housing/privaterent/tenants/Local-Housing-Allowance/figures](http://www.gov.scot/Topics/Built-Environment/Housing/privaterent/tenants/Local-Housing-Allowance/figures)
Main Findings for 1 Bedroom Properties

Over the past year, 14 out of 18 areas have seen increases in rent for 1 bedroom properties. Lothian has seen the highest increase (7.9%) while Greater Glasgow has seen an increase of 5.6% between 2016 and 2017. These are the only two areas that have shown increases which are higher than the CPI inflation of 3.0% over the same time period. Other areas that have seen increases range from 1.0% in the Ayrshires to 2.8% in both Dundee and Angus and South Lanarkshire. Four areas saw a decrease, ranging from -0.2% in Dumfries and Galloway to -11.5% in Aberdeen and Shire. This is the second consecutive annual decrease for Aberdeen and Shire, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. See Chart 2 and Table 1 below.

Average rents for 1 bedroom properties have increased by 4.0% between 2016 and 2017, at the Scotland level, from £482 in 2016 to £501 in 2017. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

Figures on changes to rents for 1 bedroom properties over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17. Over the 7 year period from 2010 to 2017, two areas have seen rent increases above the level of CPI inflation. Lothian has seen the highest increase in private rents for 1 bedroom properties, with average rents rising by 35.3% (cumulative increase over 7 years) and average rents in the Greater Glasgow area have risen by 25.6% between 2010 and 2017.

For the remaining areas of Scotland, cumulative increases were below CPI inflation and have ranged from 0.5% in West Dunbartonshire to 13.3% in Highlands and Islands. Two areas saw average rents fall between 2010 and 2017. These were the Ayrshires (-1.5%) and Aberdeen and Shire (-5.3%). These regional trends combine to show a 15.0% cumulative increase for 1 bedroom properties from £436 in 2010 to £501 in 2017.
See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

For the year to end-September 2017, Lothian had the highest average monthly rents for 1 bedroom properties across Scotland (£704), with Greater Glasgow having rents of £549. Areas with the lowest average rents for 1 bedroom properties included Scottish Borders (£345) and Ayrshires (£370). See Chart 3 below.
Main Findings for 2 Bedroom Properties

From 2016 to 2017, 15 out of 18 areas have seen increases in rent for 2 bedroom properties. These ranged from 0.7% in the Ayrshires to 6.9% in Lothian and 7.0% in Greater Glasgow. The areas which showed decreases in average rents for 2 bedroom properties between 2016 and 2017 were Aberdeen and Shire (-9.6%), Argyll and Bute (-1.7%) and West Dunbartonshire (-0.5%). This is the third consecutive annual decrease for Aberdeen and Shire, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. See Chart 4 and Table 2 below.

These regional trends combine to show an increase of 4.4% in average rents between 2016 and 2017 for 2 bedroom properties, at the Scotland level, from £616 to £643. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

Over the 7 year period from 2010 to 2017, the Lothian area of the country has seen the highest increase in private rents for 2 bedroom properties, with average monthly rents rising from £665 per month to £888, or 33.7% (cumulative increase over 7 years). Average rents in the Greater Glasgow area have risen by a cumulative 32.1% over the last 7 years (from £564 to £745).

For the remaining areas of Scotland, cumulative increases over the last 7 years have ranged from 0.7% in West Dunbartonshire to 14.9% in Fife.

These regional trends combine to show a 19.9% cumulative increase in average rents from 2010 to 2017 for 2 bedroom properties at the Scotland level, from £536 to £643.

Figures on changes to rents over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17. Over the 7 year period, average rents for 2 bedroom properties in the Lothian and Greater Glasgow areas have risen faster than the consumer price index, whilst changes in average rents for 2 bedroom properties in other areas of the country have been below the rise in the consumer price index.
See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

For the year to end-September 2017, Lothian had the highest average monthly rents for 2 bedroom properties across Scotland (£888). Other areas with higher rents included Greater Glasgow (£745), and Aberdeen and Shire (£682). Areas with the lowest average rents for 2 bedroom properties were Dumfries and Galloway (£453) and Scottish Borders (£459). See Chart 5 below.

**TABLE 2: 2 Bedroom Properties - Average (mean) Monthly Rents (£): Cumulative Changes 2010 to 2017, by Broad Rental Market Area**

<table>
<thead>
<tr>
<th>Area</th>
<th>2010</th>
<th>2016</th>
<th>2017</th>
<th>2010 to 2017 change</th>
<th>2016 to 2017 change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lothian</td>
<td>665</td>
<td>831</td>
<td>888</td>
<td>33.7%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>564</td>
<td>696</td>
<td>745</td>
<td>32.1%</td>
<td>7.0%</td>
</tr>
<tr>
<td><strong>Scotland</strong></td>
<td><strong>536</strong></td>
<td><strong>616</strong></td>
<td><strong>643</strong></td>
<td><strong>19.9%</strong></td>
<td><strong>4.4%</strong></td>
</tr>
<tr>
<td>Fife</td>
<td>464</td>
<td>511</td>
<td>533</td>
<td>14.9%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>492</td>
<td>530</td>
<td>563</td>
<td>14.2%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Highland and Islands</td>
<td>503</td>
<td>561</td>
<td>575</td>
<td>14.2%</td>
<td>2.5%</td>
</tr>
<tr>
<td>West Lothian</td>
<td>527</td>
<td>578</td>
<td>599</td>
<td>13.5%</td>
<td>3.6%</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>581</td>
<td>636</td>
<td>653</td>
<td>12.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Dundee and Angus</td>
<td>497</td>
<td>546</td>
<td>555</td>
<td>11.6%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>506</td>
<td>540</td>
<td>549</td>
<td>8.4%</td>
<td>1.7%</td>
</tr>
<tr>
<td>South Lanarkshire</td>
<td>481</td>
<td>500</td>
<td>520</td>
<td>8.2%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>473</td>
<td>494</td>
<td>508</td>
<td>7.3%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>643</td>
<td>754</td>
<td>682</td>
<td>6.1%</td>
<td>-9.6%</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>455</td>
<td>476</td>
<td>480</td>
<td>5.6%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>435</td>
<td>447</td>
<td>453</td>
<td>4.2%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>442</td>
<td>452</td>
<td>459</td>
<td>3.9%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>503</td>
<td>525</td>
<td>516</td>
<td>2.6%</td>
<td>-1.7%</td>
</tr>
<tr>
<td>West Dunbartonshire</td>
<td>492</td>
<td>498</td>
<td>496</td>
<td>0.7%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Ayrshires</td>
<td>464</td>
<td>463</td>
<td>467</td>
<td>0.5%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

See Chart 5 below.
Main Findings for 3 Bedroom Properties

Between 2016 and 2017, 15 out of 18 areas saw increases in rents. These ranged from 1.3% in Renfrewshire / Inverclyde and 1.9% in Ayrshires to 10.9% in Forth Valley. Three areas saw decreases; these were North Lanarkshire (-1.6%), Argyll and Bute (-2.1%), and Aberdeen and Shire (-6.9%). This is the third consecutive annual decrease for Aberdeen and Shire, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. See Chart 6 and Table 3 below.

These regional trends combine to show an increase of 4.6% in average rents from £753 in 2016 to £787 in 2017 for 3 bedroom properties, at the Scotland level. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

Over the 7 year period from 2010 to 2017, the Greater Glasgow area has seen the greatest increase in private rents for 3 bedroom properties, with average monthly rents rising from £728 to £965, a 32.5% increase (cumulative over 7 years). Average rents have increased in Lothian by 24.6% and by 23.2% in East Dunbartonshire.

For all other areas of Scotland, average rents for 3 bedroom properties have also increased. From 2010 to 2017, cumulative increases have ranged from 1.2% in North Lanarkshire to 17.0% in Forth Valley. Average rents in Aberdeen and Shire have risen by 16.4% over the 7 years despite rents falling between 2014 and 2017.

These regional trends combine to show a 15.9% cumulative increase from £679 in 2010 to £787 in 2017 for 3 bedroom properties at the Scotland level.

Figures on changes to rents for 3 bedroom properties over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17. Over the 7 year period, average rents for 3 bedroom properties have risen faster than the consumer price index in 8 areas, shown in Chart 6 below.

![Chart 6: Cumulative % Change in Average (mean) Rents from 2010 to 2017 (years to end-Sept), by Broad Rental Market Area - 3-Bedroom Properties](image-url)
For the year to end-September 2017, Lothian had the highest average monthly rents for 3 bedroom properties across Scotland (£1,144). Other areas with higher rents than the Scottish average for 3 bedroom properties (£787) were Greater Glasgow (£965), East Dunbartonshire (£924) and Aberdeen and Shire (£866). Areas with the lowest average rents included Dumfries and Galloway (£526), North Lanarkshire (£555), and Scottish Borders (£566). See Chart 7 below.

**TABLE 3: 3 Bedroom Properties - Average (mean) Monthly Rents (£): Cumulative Changes 2010 to 2017, by Broad Rental Market Area**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Glasgow</td>
<td>728</td>
<td>915</td>
<td>965</td>
<td>32.5%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Lothian</td>
<td>918</td>
<td>1,112</td>
<td>1,144</td>
<td>24.6%</td>
<td>2.9%</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>750</td>
<td>859</td>
<td>924</td>
<td>23.2%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>643</td>
<td>678</td>
<td>752</td>
<td>17.0%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Fife</td>
<td>563</td>
<td>617</td>
<td>657</td>
<td>16.7%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>647</td>
<td>700</td>
<td>754</td>
<td>16.6%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>744</td>
<td>930</td>
<td>866</td>
<td>16.4%</td>
<td>-6.9%</td>
</tr>
<tr>
<td>Highland and Islands</td>
<td>595</td>
<td>672</td>
<td>692</td>
<td>16.4%</td>
<td>3.1%</td>
</tr>
<tr>
<td><strong>Scotland</strong></td>
<td>679</td>
<td>753</td>
<td>787</td>
<td><strong>15.9%</strong></td>
<td><strong>4.6%</strong></td>
</tr>
<tr>
<td>West Lothian</td>
<td>616</td>
<td>691</td>
<td>709</td>
<td>15.0%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Dundee and Angus</td>
<td>633</td>
<td>702</td>
<td>717</td>
<td>13.4%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>515</td>
<td>546</td>
<td>566</td>
<td>9.9%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>612</td>
<td>643</td>
<td>652</td>
<td>6.5%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Ayrshires</td>
<td>556</td>
<td>579</td>
<td>590</td>
<td>6.0%</td>
<td>1.9%</td>
</tr>
<tr>
<td>South Lanarkshire</td>
<td>627</td>
<td>637</td>
<td>662</td>
<td>5.5%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>500</td>
<td>514</td>
<td>526</td>
<td>5.3%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>638</td>
<td>666</td>
<td>652</td>
<td>2.2%</td>
<td>-2.1%</td>
</tr>
<tr>
<td>West Dunbartonshire</td>
<td>591</td>
<td>575</td>
<td>604</td>
<td>2.2%</td>
<td>5.0%</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>549</td>
<td>564</td>
<td>555</td>
<td>1.2%</td>
<td>-1.6%</td>
</tr>
</tbody>
</table>

See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.
Main Findings for 4 Bedroom Properties

From 2016 to 2017, 13 out of 18 areas have seen increases in rent for 4 bedroom properties. The increases ranged from 0.7% in Highlands and Islands to 17.3% in Greater Glasgow and 21.5% in East Dunbartonshire. Perth and Kinross saw no change in average rents for 4 bedroom properties from 2016 to 2017, while four areas saw decreases, ranging from -0.1% in the Ayrshires to -9.5% in Aberdeen and Shire. This is the third consecutive annual decrease for Aberdeen and Shire, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. See Chart 8 and Table 4 below.

The regional trends combine to show a 4.9% increase for 4 bedroom properties from £1,089 in 2016 to £1,143 in 2017 at the Scotland level. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

Over the 2010 to 2017 period, Greater Glasgow has seen the highest increase in private rents for 4 bedroom properties, with average monthly rents rising by 42.8% (cumulative increase over 7 years). Average rents in East Dunbartonshire have risen by 36.7%, whilst average rents in Renfrewshire / Inverclyde have risen by 31.4%.

For the other areas of Scotland, cumulative increases have ranged from 6.1% in Argyll and Bute to 29.1% in Dundee and Angus. No areas of Scotland have seen decreases in average rent for 4 bedroom properties between 2010 and 2017.

These regional trends combine to show a 19.2% cumulative increase from £959 in 2010 to £1,143 in 2017 for 4 bedroom properties at the Scotland level.

Figures on changes to rents for 4 bedroom properties over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17. For example over the 7 year period, average rents for 4 bedroom properties in 12 out of the 18 areas have risen faster than the consumer price index, whilst changes in average rents for 4 bedroom properties in the other 6 areas of the country have been below the rise in the consumer price index. These can be seen in Chart 8.

![Chart 8: Cumulative % Change in Average (mean) Rents from 2010 to 2017 (years to end-Sept), by Broad Rental Market Area - 4-Bedroom Properties](chart.png)
See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

For the year to end-September 2017, Lothian had the highest average monthly rents for 4 bedroom properties across Scotland (£1,592). Other areas with higher rents included East Dunbartonshire (£1,552), Greater Glasgow (£1,524), and Aberdeen and Shire (£1,169). Areas with the lowest average rents included Dumfries and Galloway (£702), Scottish Borders (£750), and Highlands and Islands (£828). See Chart 9 below.

**TABLE 4: 4 Bedroom Properties - Average (mean) Monthly Rents (£): Cumulative Changes 2010 to 2017, by Broad Rental Market Area**

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2016</th>
<th>2017</th>
<th>2010 to 2017 change</th>
<th>2016 to 2017 change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Glasgow</td>
<td>1,067</td>
<td>1,299</td>
<td>1,524</td>
<td>42.8%</td>
<td>17.3%</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>1,135</td>
<td>1,277</td>
<td>1,552</td>
<td>36.7%</td>
<td>21.5%</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>834</td>
<td>1,015</td>
<td>1,095</td>
<td>31.4%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Dundee and Angus</td>
<td>811</td>
<td>973</td>
<td>1,047</td>
<td>29.1%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>857</td>
<td>1,052</td>
<td>1,095</td>
<td>27.8%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>944</td>
<td>1,291</td>
<td>1,169</td>
<td>23.9%</td>
<td>-9.5%</td>
</tr>
<tr>
<td>Lothian</td>
<td>1,291</td>
<td>1,512</td>
<td>1,592</td>
<td>23.4%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Ayrshires</td>
<td>758</td>
<td>908</td>
<td>907</td>
<td>19.6%</td>
<td>-0.1%</td>
</tr>
<tr>
<td><strong>Scotland</strong></td>
<td><strong>959</strong></td>
<td><strong>1,089</strong></td>
<td><strong>1,143</strong></td>
<td><strong>19.2%</strong></td>
<td><strong>4.9%</strong></td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>858</td>
<td>1,018</td>
<td>1,018</td>
<td>18.8%</td>
<td>0.0%</td>
</tr>
<tr>
<td>South Lanarkshire</td>
<td>924</td>
<td>1,022</td>
<td>1,097</td>
<td>18.7%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Fife</td>
<td>773</td>
<td>901</td>
<td>917</td>
<td>18.6%</td>
<td>1.8%</td>
</tr>
<tr>
<td>West Lothian</td>
<td>834</td>
<td>920</td>
<td>975</td>
<td>16.9%</td>
<td>6.0%</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>776</td>
<td>823</td>
<td>889</td>
<td>14.6%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>620</td>
<td>646</td>
<td>702</td>
<td>13.3%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Highland and Islands</td>
<td>751</td>
<td>822</td>
<td>828</td>
<td>10.3%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>690</td>
<td>740</td>
<td>750</td>
<td>8.8%</td>
<td>1.4%</td>
</tr>
<tr>
<td>West Dunbartonshire</td>
<td>821</td>
<td>907</td>
<td>886</td>
<td>7.9%</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>924</td>
<td>989</td>
<td>980</td>
<td>6.1%</td>
<td>-0.8%</td>
</tr>
</tbody>
</table>

See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

**CHART 9: Average (mean) Monthly Rents 2017 (year to end-Sept), by Broad Rental Market Area - 4-Bedroom Properties**
Main Findings for 1 Bedroom in a Shared Property

From 2016 to 2017, 15 out of 18 areas have seen increases in rent for 1 bedroom shared properties. The increases ranged from 0.1% in Renfrewshire / Inverclyde to 18.7% in East Dunbartonshire. There were three areas that saw decreases, ranging from -0.3% in Argyll and Bute to -11.3% in Aberdeen and Shire. This is the second consecutive annual decrease for Aberdeen and Shire, which is likely to reflect decreased demand for rental properties following the downturn in the oil industry. See Chart 10 and Table 5 below.

These regional trends combine to show an increase of 3.0% in average rents from £340 in 2016 to £350 in 2017 for 1 bedroom in a shared property at the Scotland level. This compares to an increase in the UK Consumer Price Index of 3.0% in the year to Sept-17.

Over the 7 year period from 2010 to 2017, Forth Valley has seen the highest increase in average private rents for 1 bedroom shared properties, with average rents rising by 29.5% (cumulative increase over 7 years).

A further 10 areas have seen increases that were higher than the Scotland average over the 7 years (16.6%). These ranged from 16.8% in North Lanarkshire to 28.4% in Fife.

Other areas that saw increases to a lesser extent ranged from 2.7% in Renfrewshire / Inverclyde to 14.6% in West Dunbartonshire. Argyll and Bute was the only area to see an decrease in average rents between 2010 and 2017 (-4.7%).

These regional trends combine to show a 16.6% cumulative increase from £300 in 2010 to £350 in 2017 for 1 bedroom shared properties at the Scotland level.

Figures on changes to rents for 1 bedroom shared properties over the period from 2010 to 2017 should be considered in the context of the cumulative increase in the UK Consumer Price Index of 15.9% from Sept-10 to Sept-17. Over the 7 year period, average rents for 1 bedroom shared properties in 11 out of 18 areas of Scotland have risen faster than the consumer price index, whilst changes in average rents for 1 bedroom shared properties in other areas of the country have been below the rise in the consumer price index. This is shown on Chart 10.
Note: Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services. See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

For the year to end-September 2017, Lothian had the highest average monthly rents for 1 bedroom shared properties across Scotland (£390). Other areas with higher rents included Greater Glasgow (£386), East Dunbartonshire (£385), South Lanarkshire (£371), and Aberdeen and Shire (£358). Areas with the lowest average rents included Dumfries and Galloway (£292), Argyll and Bute (£301) and Renfrewshire / Inverclyde (£304). See Chart 11 below.

**TABLE 5: 1 Bedroom Shared Properties - Average (mean) Monthly Rents (£): Cumulative Changes 2010 to 2017, by Broad Rental Market Area**

<table>
<thead>
<tr>
<th>Broad Rental Market Area</th>
<th>2010</th>
<th>2016</th>
<th>2017</th>
<th>2010 to 2017 change</th>
<th>2016 to 2017 change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forth Valley</td>
<td>276</td>
<td>351</td>
<td>357</td>
<td>29.5%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Fife</td>
<td>271</td>
<td>368</td>
<td>348</td>
<td>28.4%</td>
<td>-6.6%</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>300</td>
<td>325</td>
<td>385</td>
<td>28.3%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>313</td>
<td>372</td>
<td>386</td>
<td>23.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>256</td>
<td>270</td>
<td>312</td>
<td>22.1%</td>
<td>15.5%</td>
</tr>
<tr>
<td>Lothian</td>
<td>320</td>
<td>368</td>
<td>390</td>
<td>22.0%</td>
<td>6.1%</td>
</tr>
<tr>
<td>South Lanarkshire</td>
<td>309</td>
<td>315</td>
<td>371</td>
<td>20.1%</td>
<td>17.8%</td>
</tr>
<tr>
<td>West Lothian</td>
<td>279</td>
<td>318</td>
<td>332</td>
<td>19.0%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Dundee and Angus</td>
<td>263</td>
<td>296</td>
<td>309</td>
<td>17.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>262</td>
<td>288</td>
<td>308</td>
<td>17.6%</td>
<td>6.8%</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>297</td>
<td>320</td>
<td>347</td>
<td>16.8%</td>
<td>8.4%</td>
</tr>
<tr>
<td><strong>Scotland</strong></td>
<td>300</td>
<td>340</td>
<td>350</td>
<td><strong>16.6%</strong></td>
<td><strong>3.0%</strong></td>
</tr>
<tr>
<td>West Dunbartonshire</td>
<td>289</td>
<td>322</td>
<td>331</td>
<td>14.6%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Highland and Islands</td>
<td>287</td>
<td>320</td>
<td>327</td>
<td>13.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Ayrshires</td>
<td>302</td>
<td>335</td>
<td>338</td>
<td>12.1%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>328</td>
<td>404</td>
<td>358</td>
<td>9.1%</td>
<td>-11.3%</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>278</td>
<td>285</td>
<td>292</td>
<td>5.1%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>296</td>
<td>304</td>
<td>304</td>
<td>2.7%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>316</td>
<td>302</td>
<td>301</td>
<td>-4.7%</td>
<td>-0.3%</td>
</tr>
</tbody>
</table>

Note: Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services. See Reference Tables (Tables 7 to 14) for a more detailed breakdown of quartile and average rents for each year.

For the year to end-September 2017, Lothian had the highest average monthly rents for 1 bedroom shared properties across Scotland (£390). Other areas with higher rents included Greater Glasgow (£386), East Dunbartonshire (£385), South Lanarkshire (£371), and Aberdeen and Shire (£358). Areas with the lowest average rents included Dumfries and Galloway (£292), Argyll and Bute (£301) and Renfrewshire / Inverclyde (£304). See Chart 11 below.

**CHART 11: Average (mean) Monthly Rents 2017 (year to end-Sept), by Broad Rental Market Area - 1-Bedroom Shared Properties**

![Chart 11: Average (mean) Monthly Rents 2017 (year to end-Sept), by Broad Rental Market Area - 1-Bedroom Shared Properties](chart11.png)
Scotland-level Average Rents

Table 6 and Chart 12 below provide a summary of Scotland level changes to average (mean) rental prices over the years 2010 to 2017. Further information on the suitability of carrying out analysis at a Scotland level given the sample proportions each year across Broad Rental Market Areas is included in Annex C.

![Chart 12: Average (mean) monthly rents, by Property Size: Scotland, 2010 to 2017](chart)

**TABLE 6: Summary of Average (mean) Private Rents (£ monthly): Scotland, 2010 to 2017 (years to end Sept)**

<table>
<thead>
<tr>
<th>Property Type</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Bedroom Property</td>
<td>436</td>
<td>439</td>
<td>447</td>
<td>454</td>
<td>472</td>
<td>480</td>
<td>482</td>
<td>501</td>
</tr>
<tr>
<td>2 Bedroom Property</td>
<td>536</td>
<td>546</td>
<td>553</td>
<td>576</td>
<td>596</td>
<td>610</td>
<td>616</td>
<td>643</td>
</tr>
<tr>
<td>3 Bedroom Property</td>
<td>679</td>
<td>672</td>
<td>695</td>
<td>707</td>
<td>724</td>
<td>744</td>
<td>753</td>
<td>787</td>
</tr>
<tr>
<td>4 Bedroom Property</td>
<td>959</td>
<td>971</td>
<td>983</td>
<td>1,060</td>
<td>1,083</td>
<td>1,097</td>
<td>1,089</td>
<td>1,143</td>
</tr>
<tr>
<td>1 Bedroom in Shared Property</td>
<td>300</td>
<td>294</td>
<td>301</td>
<td>309</td>
<td>317</td>
<td>327</td>
<td>340</td>
<td>350</td>
</tr>
</tbody>
</table>

**Percentage Increases:**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Bedroom Property</td>
<td>0.8%</td>
<td>1.8%</td>
<td>1.6%</td>
<td>3.9%</td>
<td>1.6%</td>
<td>0.4%</td>
<td>4.0%</td>
<td>15.0%</td>
</tr>
<tr>
<td>2 Bedroom Property</td>
<td>1.9%</td>
<td>1.2%</td>
<td>4.2%</td>
<td>3.6%</td>
<td>2.2%</td>
<td>1.0%</td>
<td>4.4%</td>
<td>19.9%</td>
</tr>
<tr>
<td>3 Bedroom Property</td>
<td>-1.0%</td>
<td>3.4%</td>
<td>1.8%</td>
<td>2.3%</td>
<td>2.8%</td>
<td>1.2%</td>
<td>4.6%</td>
<td>15.9%</td>
</tr>
<tr>
<td>4 Bedroom Property</td>
<td>1.3%</td>
<td>1.2%</td>
<td>7.8%</td>
<td>2.2%</td>
<td>1.3%</td>
<td>-0.7%</td>
<td>4.9%</td>
<td>19.2%</td>
</tr>
<tr>
<td>1 Bedroom in Shared Property</td>
<td>-2.0%</td>
<td>2.5%</td>
<td>2.6%</td>
<td>2.6%</td>
<td>3.0%</td>
<td>4.0%</td>
<td>3.0%</td>
<td>16.6%</td>
</tr>
</tbody>
</table>

**Notes:**

Figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.

Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.

Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
From Table 6, it can be seen that average (mean) rents at a Scotland level have increased for all property sizes over the period from 2010 to 2017 (cumulative increases over 7 years).

The greatest cumulative increases over the 7 years from 2010 to 2017 have been for 2 bedroom properties (19.9% increase) and 4 bedroom properties (19.2% increase). Rents for 1 bedroom in shared properties have seen a cumulative increase of 16.6% whilst 3 bedroom properties have increased by 15.9%. Over the 7 years, 1 bedroom properties have seen a cumulative increase of 15.0%.

For 1, 2 and 3 bedroom properties, the latest annual increases of 4.0%, 4.4% and 4.6%, respectively, between 2016 and 2017 are all higher than any previous annual increases since 2010. For 4 bedroom properties, the latest annual increase of 4.9% between 2016 and 2017 is higher than any previous year since 2010, except for the 7.8% increase that was seen between 2012 and 2013. For 1 bedroom shared properties, the latest annual increase of 3.0% between 2016 and 2017 is broadly similar to previous annual increases since 2010, which have ranged from 2.5% to 4.0%, except for the 2.0% drop that was seen between 2010 and 2011.

Note that some of the Scotland level trends may reflect in part any significant trends at a local area level, for example cumulative increases in average rents for particular property sizes in particular areas of the country, rather than being indicative of trends in rents across all areas of the country.
Broad Rental Market Area Profiles

This section provides profiles for private rents in each of the 18 Broad Rental Market Areas. The commentary focusses on annual changes and 7 year cumulative changes for average (mean) rents by property sizes, as well as changes over time to the bottom end (lower quartile) and top end (upper quartile) of the rental markets. The commentary does not cover changes to median rents given that these often show similar trends to mean rents, however users may also wish to look at the median figures and trends in the profile tables and charts.

The map on the following page illustrates the different geographical areas covered by each Broad Rental Market Area. It is also possible to search for the Broad Rental Market Area associated with a particular postcode at http://lha-direct.voa.gov.uk/search.aspx. This website provides detailed PDF maps of each area.

The infographic on page 23 illustrates the changes in average rents in each area by property size.

Excel versions of each of the Broad Rental Market Area Profiles along with an online Interactive Excel Workbook, in which different rental measures, Broad Rental Market Areas and property sizes can be selected and compared in the same chart, are both available at http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration.

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7 A Broad Rental Market Area for Local Housing Allowance purposes is defined as an area in which a person could reasonably be expected to live having regard to facilities and services for the purposes of health, education, recreation, personal banking and shopping, taking account of the distance of travel, by public and private transport, to and from those facilities and services.

8 Means, medians, and lower and upper quartiles are defined in Annex B – Glossary of Terms.
Broad Rental Market Area
1. Aberdeen and Shire
2. Argyll and Bute
3. Ayrshires
4. Dumfries and Galloway
5. Dundee and Angus
6. East Dunbartonshire
7. Fife
8. Forth Valley
9. Greater Glasgow
10. Highland and Islands
11. Lothian
12. North Lanarkshire
13. Perth and Kinross
14. Renfrewshire / Inverclyde
15. Scottish Borders
16. South Lanarkshire
17. West Dunbartonshire
18. West Lothian
Average (mean) rents have decreased across all property sizes between 2016 and 2017. The latest annual decreases range from -6.9% for 3 bedroom properties, to -11.5% for 1 bedroom properties, which compares to CPI inflation of +3.0% across this time period. Average rents for 2, 3, and 4 bedroom properties began decreasing between 2014 and 2015, following which average rents have fallen for each property size since then. This is likely to reflect decreased demand for rental properties following the downturn in the oil industry. Despite these drops, average rents in 2017 are still higher than in 2010 except for 1 bedroom properties, which have seen a drop of 5%. Since 2010, 3 and 4 bedroom property rents have increased by 16.4% and 23.9% respectively, which is higher than CPI inflation (15.9%) over this period.

For 3 and 4 bedroom properties, greater increases at the top end (upper quartile) than the bottom end (lower quartile) between 2012 and 2014 caused the gap between the top end and bottom ends to widen, although this gap has narrowed in more recent years.

The average 2 bedroom rent in 2017 was £682 per month, higher than the Scotland average of £643, however this gap has narrowed in recent years as rents in Aberdeen and Shire have fallen while the Scotland average has increased.
Average (mean) rents in Argyll and Bute have decreased between 2016 and 2017 for all property sizes, except 1 bedroom properties. Decreases range from -0.3% to -2.1% for 1 bedroom shared and 3 bedroom properties, respectively. An increase of 1.2% was seen for 1 bedroom properties, however this is below CPI inflation of 3.0%. Despite the decreases seen in the latest year, between 2010 and 2017, average rents have increased for all property sizes, except 1 bedroom shared. These increases range from 2.2% to 9.2% for 3 and 1 bedroom properties, respectively, which compares to CPI inflation of 15.9% across this time period.

For 1 bedroom properties, an increase in the bottom end of the market (lower quartile) has caused the gap between the top and bottom ends to narrow in the latest year, whilst for 1 bedroom shared and 4 bedroom properties there has been an increase in the upper quartile and a decrease in the lower quartile in the most recent year, widening the gap between top and bottom ends.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has grown over the years, with the average rent in 2017 being £516 per month, compared to the Scotland average of £643.
Broad Rental Market Area Profile: Ayrshires

Between 2016 and 2017, average (mean) rents have remained fairly constant across all property sizes in the Ayrshires, with changes varying from -0.1% for 4 bedroom properties to +1.9% for 3 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017, average rents have increased for all property sizes, except 1 bedroom. The largest increases have been seen for 4 bedroom and 1 bedroom shared properties, with increases of 19.6% and 12.1%, respectively, which compares to CPI inflation of 15.9% across this time period.

For 4 bedroom properties, an increase in the top end (upper quartile) has widened the gap between bottom end and top end rents in the latest year. The gap for 1 bedroom properties has narrowed in the latest year due to an increase in the bottom end (lower quartile) and is now same as it was in 2010.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has grown over the years, with the average rent in 2017 being £467 per month, compared to the Scotland average of £643.


<table>
<thead>
<tr>
<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>350</td>
<td>375</td>
<td>375</td>
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Sample Sizes:

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The gap for 1 bedroom properties has narrowed in the latest year due to an increase in the bottom end (lower quartile) and is now same as it was in 2010.
Average (mean) rents in Dumfries and Galloway between 2010 and 2017 have increased for all property sizes, except 1 bedroom. Increases ranged from 1.5%, for 2 bedroom properties, to 8.8% for 4 bedroom properties, which compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017 average rents have increased for all property sizes, from 4.2% to 13.3%, for 2 and 4 bedroom properties, respectively. This compares to CPI inflation of 15.9% across this time period.

In the latest year, for 1 bedroom shared and 3 bedroom properties, increases in the top end (upper quartile) have caused the gap between the top and bottom ends to widen. 1 bedroom properties have seen the bottom end (lower quartile) fall in the latest year, widening the gap between the two ends in the latest year, but to levels similar to 2015. The gap has stayed the same for 4 bedroom properties, whilst narrowing slightly for 2 bedroom properties due to an increase in bottom end rents.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has grown over the years, with the average rent in 2017 being £453 per month, compared to the Scotland average of £643.

1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<tr>
<th>Year</th>
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2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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Sample Sizes:


Average (mean) rents between 2016 and 2017 have increased for all property sizes, ranging from an increase of 1.6% for 2 bedroom properties to an increase of 7.7% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Average rents for all property sizes have also increased between 2010 and 2017, with increases ranging from 11.6% for 2 bedroom properties to 29.1% for 4 bedroom properties. This compares to CPI inflation of 15.9% across this time period.

For all property sizes, except 1 bedroom shared, rent increases between 2010 and 2017 have been greater at the top end (upper quartile) than the bottom end (lower quartile), causing the gap between top and bottom ends of the market to widen.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened since 2011 with the average rent in 2017 being £55 per month, compared to the Scotland average of £643.

Average (mean) rents between 2016 and 2017 have increased for 1 bedroom properties, ranging from an increase of 0.0% for 1 bedroom properties to an increase of 7.3% for 4 bedroom properties. This compares to CPI inflation of 2.2% across this time period. Average rents for 1 bedroom properties have also increased between 2010 and 2017, with increases ranging from 3.7% for 1 bedroom properties to 13.3% for 4 bedroom properties. This compares to CPI inflation of 7.7% across this time period.

Average rents between 2010 and 2017 have increased for all property sizes, ranging from an increase of 0.0% for 1 bedroom properties to an increase of 13.3% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Average rents for all property sizes have also increased between 2010 and 2017, with increases ranging from 11.6% for 2 bedroom properties to 29.1% for 4 bedroom properties. This compares to CPI inflation of 15.9% across this time period.

For all property sizes, except 1 bedroom shared, rent increases between 2010 and 2017 have been greater at the top end (upper quartile) than the bottom end (lower quartile), causing the gap between top and bottom ends of the market to widen.

Average rents between 2016 and 2017 have increased for 1 bedroom properties, ranging from an increase of 0.0% for 1 bedroom properties to an increase of 7.3% for 4 bedroom properties. This compares to CPI inflation of 2.2% across this time period. Average rents for 1 bedroom properties have also increased between 2010 and 2017, with increases ranging from 3.7% for 1 bedroom properties to 13.3% for 4 bedroom properties. This compares to CPI inflation of 7.7% across this time period.

Average (mean) rents between 2016 and 2017 have increased for all property sizes, ranging from an increase of 1.6% for 2 bedroom properties to an increase of 7.7% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Average rents for all property sizes have also increased between 2010 and 2017, with increases ranging from 11.6% for 2 bedroom properties to 29.1% for 4 bedroom properties. This compares to CPI inflation of 15.9% across this time period.
### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 2 Bed Average (mean) monthly

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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### Sample Sizes:

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For all property types, except 4 bedroom, rents between 2010 and 2017 have increased more at the top end (upper quartile) that at bottom end (lower quartile) of the market, causing a widening gap between the top and bottom end of the market.

Average 2 bedroom rents have been higher than the Scotland average in each year since 2010, although rents have been only slightly higher than the Scotland figures since 2013 onwards, with the average rent in 2017 being £653 per month, compared to the Scotland average of £643.
Broad Rental Market Area Profile: Fife

Average (mean) rents in Fife have increased between 2016 and 2017 for all property sizes, except 1 bedroom shared. Increases range from between 1.8% for 4 bedroom properties to 6.5% for 3 bedroom properties. Average rents have decreased for 1 bedroom shared properties by 5.6%. This compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017 average rents have increased across all property sizes, ranging from an increase of 8.6% for 1 bedroom properties to an increase of 28.4% for 1 bedroom shared properties. This compares to CPI inflation of 15.9% across this time period.

For all property types greater increases in the top end (upper quartile) of rents compared to the bottom end (lower quartile) have widened the gap in rents between 2010 and 2017.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has grown slightly over the years, with the average rent in 2017 being £593 per month, compared to the Scotland average of £643.

1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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Sample Sizes:

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### 2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<tr>
<td>2017</td>
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### Sample Sizes:


### Average rents between 2010 and 2017

- Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, with the average rent in 2017 being £563 per month, compared to the Scotland average of £643. The gap grew between 2011 and 2015, then narrowed in 2016 and 2017.

### Across all property sizes, since 2010 there has been greater increases in the median than the upper quartile, resulting in the gap between top and bottom ends of the market widening.

### Between 2016 and 2017, average (mean) rents in Forth Valley have increased by 11.4% for all property sizes. Increases range from 7.2% for 1 bedroom properties to 29.5% for 1 bedroom shared properties, which compares to CPI inflation of 15.9% across this time period.

### Between 2016 and 2017, average (mean) rents in Forth Valley have increased by 11.4% for all property sizes. Increases range from 7.2% for 1 bedroom properties to 29.5% for 1 bedroom shared properties, which compares to CPI inflation of 15.9% across this time period.
Broad Rental Market Area Profile: Greater Glasgow

Average (mean) rents in the Greater Glasgow area have increased for all property sizes between 2010 and 2017, ranging from an increase of 3.6% for 1 bedroom shared properties to an increase of 17.3% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Average rents have also increased between 2010 and 2017, with increases ranging from 23.1% to 42.8% for 1 bedroom shared and 4 bedroom properties, respectively. This compares to CPI inflation of 15.9% across this time period.

For all property sizes there have been greater increases in the top end (upper quartile) of rents between 2010 and 2017, which has widened the gap in rents compared to the bottom end of the market (lower quartile).

Average 2 bedroom rents have been higher than the Scotland average in each year since 2010, and the difference has grown since 2014, with the average rent in 2017 being £745 per month, compared to the Scotland average of £643.

1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

- 2010: £284
- 2011: £300
- 2012: £313
- 2013: £345
- 2014: £308
- 2015: £350
- 2016: £372
- 2017: £425

1 Bedroom Shared Properties - Quartile Measures, years to end Sept, (£ monthly):

- 2010: £284
- 2011: £300
- 2012: £313
- 2013: £345
- 2014: £308
- 2015: £350
- 2016: £372
- 2017: £425

2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

- 2010: £753
- 2011: £325
- 2012: £368
- 2013: £451
- 2014: £485
- 2015: £520
- 2016: £594
- 2017: £625

3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

- 2010: £850
- 2011: £1,049
- 2012: £1,200
- 2013: £1,450
- 2014: £1,840
- 2015: £2,000
- 2016: £2,200
- 2017: £2,500

4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

- 2010: £975
- 2011: £1,000
- 2012: £1,049
- 2013: £1,170
- 2014: £1,198
- 2015: £1,250
- 2016: £1,300
- 2017: £1,500

Sample Sizes:

Broad Rental Market Area Profile: Highlands and Islands

Average (mean) rents in the Highlands and Islands have increased for all property sizes between 2010 and 2017. Increases ranged from 0.7% for 4 bedroom properties, to 3.1% for 3 bedroom properties, which compares to CPI inflation of 3.0% across this time period. Average rents have also increased for all property sizes between 2010 and 2017, ranging from an increase of 10.3% for 4 bedroom properties to an increase of 16.4% for 3 bedroom properties. This compares to CPI inflation of 15.9% across this time period.

For all property sizes there have been greater increases at the top end (upper quartile) than at the bottom end (lower quartile) of the market between 2010 and 2017, which has resulted in a widening gap between top and bottom ends of the market.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, with the average rent in 2017 being £575 per month, compared to the Scotland average of £643. The gap has grown over the years.

### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Year</th>
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### 2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
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<tr>
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<tr>
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### Sample Sizes:

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</tr>
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<td>100</td>
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</tr>
<tr>
<td>3 Bedrooms</td>
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</tr>
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</tr>
</tbody>
</table>

Average rents have been lower than the Scotland average between 2010 and 2017, which has resulted in a widening gap between top and bottom ends of the market.
Average (mean) rents in the Lothian area have increased for all property sizes between 2016 and 2017, ranging from 2.9% for 3 bedroom properties, to 7.9% for 1 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Average rents have also increased for all property sizes between 2010 and 2017. Increases over this time period ranged from 22.0% for 1 bedroom shared properties to 35.3% for 1 bedroom properties, which compares to CPI inflation of 15.9%.

For all property sizes, since 2010 increases in the top end (upper quartile) of rents have been greater than increases in the bottom end (lower quartile), which has widened the gap in rents.

Average 2 bedroom rents have been higher than the Scotland average in each year since 2010, and this difference has grown since 2013, with the average rent in 2017 being £888 per month, compared to the Scotland average of £543.

**Broad Rental Market Area Profile: Lothian**

**2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):**

<table>
<thead>
<tr>
<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>680</td>
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<tr>
<td>2013</td>
<td>700</td>
<td>2.9%</td>
<td>920</td>
</tr>
<tr>
<td>2014</td>
<td>1,321</td>
<td>395</td>
<td>325</td>
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<tr>
<td>2015</td>
<td>1,400</td>
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<td></td>
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<tr>
<td>2016</td>
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**Sample Sizes:**

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<th>25.0%</th>
<th>2012</th>
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<tbody>
<tr>
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<td>515</td>
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<tr>
<td>2017</td>
<td>850</td>
<td>329</td>
<td>546</td>
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</table>

**3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):**

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<th>Median</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
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<tr>
<td>2016</td>
<td>1,100</td>
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**4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):**

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<th>Upper Quartile</th>
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</thead>
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**1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):**

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<tr>
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<th>Median</th>
<th>Upper Quartile</th>
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</thead>
<tbody>
<tr>
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<tr>
<td>2015</td>
<td>613</td>
<td>610</td>
<td>643</td>
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</table>

**1 Bedroom Shared Properties - Quartile Measures, years to end Sept, (£ monthly):**

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<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>251</td>
<td>243</td>
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<td>2013</td>
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</tr>
<tr>
<td>2014</td>
<td>379</td>
<td>397</td>
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</tr>
</tbody>
</table>

**Median & Upper Quartile:**

- **2 Bedroom Properties:**
  - Median: 1,100
  - Upper Quartile: 1,400

- **3 Bedroom Properties:**
  - Median: 280
  - Upper Quartile: 328

- **4 Bedroom Properties:**
  - Median: 895
  - Upper Quartile: 1,291

- **1 Bedroom Properties:**
  - Median: 665
  - Upper Quartile: 831

- **1 Bedroom Shared Properties:**
  - Median: 251
  - Upper Quartile: 329
Between 2016 and 2017, average (mean) rents in North Lanarkshire have increased for all property sizes, except 3 bedrooms which decreased by 1.6%. The increases range from 0.9% for 2 bedroom properties to 8.4% for 1 bedroom shared properties, which compares to CPI inflation of 3.0% across this time period. Average rents increased for all property sizes between 2010 and 2017 with the largest increase, 16.8%, being seen for 1 bedroom shared properties. This compares to CPI inflation of 15.9% across this time period.

For 4 bedroom properties, in the latest year there has been an increase in the top end (upper quartile) rents and a decrease in the bottom end (lower quartile), which has widened the gap in rents. Both 1 and 2 bedroom properties have seen no change in the gap in the latest year, although the gap is bigger than in 2010 due to increases in the top end.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and this gap has widened over the years, with the average rent in 2017 being £480 per month, compared to the Scotland average of £643.

---

1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
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<tr>
<th>Year</th>
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<tbody>
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<td>464</td>
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2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Upper Quartile</th>
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<tr>
<td>2017</td>
<td>546</td>
<td>546</td>
<td>546</td>
<td>546</td>
</tr>
</tbody>
</table>

3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
<thead>
<tr>
<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
</tr>
</thead>
<tbody>
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<tr>
<td>2017</td>
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4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<tr>
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<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
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<tr>
<td>2017</td>
<td>546</td>
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</tbody>
</table>

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Sample Sizes:

- 1 Bedroom: 153, 185, 162, 127, 164, 160, 181, 233
- 2 Bedrooms: 468, 548, 430, 431, 468, 437, 505, 513
- 3 Bedrooms: 180, 251, 229, 199, 208, 237, 215, 253
- 4 Bedrooms: 102, 97, 96, 66, 55, 62, 47, 60
- 1 Bedroom Shared: 44, 51, 64, 59, 51, 64, 69, 104
Broad Rental Market Area Profile: Perth and Kinross

Average (mean) rents in Perth and Kinross have increased for all property sizes between 2016 and 2017, except 4 bedroom properties which have remained the same. The increases range from 1.7% for 2 bedroom properties to 7.8% for 3 bedroom properties, which compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017 there have been increases in the average rent for all property sizes, from 8.4% for 2 bedroom properties and 18.8% for 4 bedroom properties. This compares to CPI inflation of 15.9% across this time period.

For 3 bedroom properties, between 2010 and 2017 there has been a greater increase in the top end (upper quartile) rents compared to the bottom end (lower quartile), which has caused an increase in the gap between them. Other property sizes have seen smaller changes in the gap between top end and bottom end rents.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened over the years, with the average rent in 2017 being £549 per month, compared to the Scotland average of £543.
Average (mean) rents decreased by 1.3% between 2016 and 2017 for 1 bedroom properties. All other property sizes have increased, ranging from 0.1% for 1 bedroom shared properties to 8.0% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017 average rents increased for all property sizes. Increases range from 2.7% for 1 bedroom shared to 31.4% for 4 bedroom properties, which compares to CPI inflation of 15.9% across this time period.

For 1 bedroom, 3 bedroom and 1 bedroom shared properties, there has been an greater increase in the top end (upper quartile) rents than in the bottom end (lower quartile) since 2010, which has widened the gap in rents.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened over the years, with the average rent in 2017 being £508 per month, compared to the Scotland average of £643.

Average (mean) rents decreased by 1.3% between 2016 and 2017 for 1 bedroom properties. All other property sizes have increased, ranging from 0.1% for 1 bedroom shared properties to 8.0% for 4 bedroom properties. This compares to CPI inflation of 3.0% across this time period. Between 2010 and 2017 average rents increased for all property sizes. Increases range from 2.7% for 1 bedroom shared to 31.4% for 4 bedroom properties, which compares to CPI inflation of 15.9% across this time period.

For 1 bedroom, 3 bedroom and 1 bedroom shared properties, there has been an greater increase in the top end (upper quartile) rents than in the bottom end (lower quartile) since 2010, which has widened the gap in rents.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened over the years, with the average rent in 2017 being £508 per month, compared to the Scotland average of £643.
Average (mean) rent in the Scottish Borders increased for all property sizes between 2016 and 2017. Increases range from 1.4%, for both 2 and 4 bedroom properties, to 15.5% for 1 bedroom shared properties. This compares to CPI inflation of 3.0% across this time period. Average rents have also increased for all property sizes between 2010 and 2017, with increases ranging from 2.6% to 22.1% for 1 bedroom and 1 bedroom shared properties, respectively. This compares to CPI inflation of 15.9% across this time period.

In the latest year, the gap between the top end rents (upper quartile) and the bottom end (lower quartile) has increased for 2 bedroom, 3 bedroom and 1 bedroom shared properties. Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened over the years, with the average rent in 2017 being £459 per month, compared to the Scotland average of £643.

**Broad Rental Market Area Profile: Scottish Borders**

1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
<thead>
<tr>
<th>Year</th>
<th>Lower Quartile</th>
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<th>Mean</th>
<th>Upper Quartile</th>
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2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Year</th>
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<tr>
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</table>

3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
<thead>
<tr>
<th>Year</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
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</thead>
<tbody>
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4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
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<tbody>
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Sample Sizes:

1 Bedroom
- 2010: 100
- 2011: 100
- 2012: 100
- 2013: 100
- 2014: 100
- 2015: 100
- 2016: 100
- 2017: 100

2 Bedrooms
- 2010: 200
- 2011: 200
- 2012: 200
- 2013: 200
- 2014: 200
- 2015: 200
- 2016: 200
- 2017: 200

3 Bedrooms
- 2010: 300
- 2011: 300
- 2012: 300
- 2013: 300
- 2014: 300
- 2015: 300
- 2016: 300
- 2017: 300

4 Bedrooms
- 2010: 400
- 2011: 400
- 2012: 400
- 2013: 400
- 2014: 400
- 2015: 400
- 2016: 400
- 2017: 400

Average (mean) monthly rents (£): 2010 to 2017

<table>
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</tr>
<tr>
<td>2017</td>
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</table>

**Note:** The data includes the years 2010 to 2017 for each property type.
Broad Rental Market Area Profile: South Lanarkshire

Average (mean) rent in South Lanarkshire have increased across all property sizes between 2016 and 2017. Increases range from 2.8% for 1 bedroom properties to 17.8% for 1 bedroom shared properties, which compares to CPI inflation of 3.0% across this period. Average rents have also increased between 2010 and 2017 for all property sizes, ranging from 2.4% for 1 bedroom properties to 20.1% for 1 bedroom shared properties. This compares to CPI inflation of 15.9% across this period.

For 2 bedroom, 3 bedroom and 1 bedroom shared property sizes there have been greater increases at the top end (upper quartile) than the bottom end (lower quartile) of the market which has resulted in a widening gap between top and bottom ends of the market in the latest year.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened since 2011, with the average rent in 2017 being £520 per month, compared to the Scotland average of £643.

### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<tr>
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### 2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<td>Mean</td>
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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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</thead>
<tbody>
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<td>550</td>
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<td>625</td>
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</tr>
<tr>
<td>Mean</td>
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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th></th>
</tr>
</thead>
<tbody>
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<td>800</td>
<td>825</td>
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<tr>
<td>Median</td>
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<td>848</td>
<td>925</td>
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<tr>
<td>Mean</td>
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<td>1,022</td>
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### Sample Sizes:

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<tr>
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<tr>
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<tr>
<td>3 Bedrooms</td>
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</table>

For 1 bedroom shared properties, the average rent has increased from £395 to £695 over the period from 2010 to 2017, with the gap between top and bottom ends of the market in the latest year.

Average 1 bedroom shared rents have been lower than the Scotland average in each year since 2010, and the gap has widened since 2011, with the average rent in 2017 being £520 per month, compared to the Scotland average of £643.

### Broad Rental Market Area Profile

- **South Lanarkshire**
- Each year since 2010, and the gap has widened since 2011, with the average rent in 2017 being £520 per month, compared to the Scotland average of £643.
Average (mean) rents between 2016 and 2017 have decreased for 1, 2, and 4 bedroom properties, with decreases ranging from -0.4% to -2.3%. Rents increased for 3 bedroom properties by 5.0% and by 2.8% for 1 bedroom shared properties, which compares to CPI inflation of 3.0% across this time period. Average rents have increased for all property sizes between 2010 and 2017. Increases ranged from 0.5% for 1 bedroom properties and 14.6% for 1 bedroom shared properties. This compares to CPI inflation of 15.9% across this time period.

There have been varied changes to the top and bottom ends of the market for each property size between 2010 and 2017. Most property sizes have similar gaps between top and bottom end rents in 2017 compared with 2010, except for 3 bedroom properties, for which an increase in the bottom end (lower quartile) in the latest year has narrowed the gap.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, and the gap has widened over the years, with the average rent in 2017 being £496 per month, compared to the Scotland average of £543.

### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
<thead>
<tr>
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<tr>
<td>2017</td>
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</tr>
</tbody>
</table>

### 2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
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</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>2017</td>
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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<tr>
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<td></td>
</tr>
<tr>
<td>2017</td>
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</tbody>
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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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</tr>
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<td></td>
</tr>
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<td>2017</td>
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### Sample Sizes:

<table>
<thead>
<tr>
<th>Year</th>
<th>1 Bedroom</th>
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<th>3 Bedrooms</th>
<th>4 Bedrooms</th>
<th>1 Bedroom Shared</th>
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### 1 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Year</th>
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<th>Mean</th>
<th>Upper Quartile</th>
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### 2 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Year</th>
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<th>Mean</th>
<th>Upper Quartile</th>
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### 3 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Upper Quartile</th>
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### 4 Bedroom Properties - Quartile Measures, years to end Sept, (£ monthly):

<table>
<thead>
<tr>
<th>Year</th>
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<th>Mean</th>
<th>Upper Quartile</th>
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<td>825</td>
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<td>2012</td>
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<td>800</td>
<td>825</td>
<td>850</td>
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<tr>
<td>2014</td>
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### 1 Bedroom Shared Properties - Quartile Measures, years to end Sept, (£ monthly):

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<th>Mean</th>
<th>Upper Quartile</th>
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<tr>
<td>2017</td>
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### Sample Sizes:

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<th>3 Bedrooms</th>
<th>4 Bedrooms</th>
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<td>173</td>
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Average (mean) rents in West Lothian between 2016 and 2017 have increased across all property sizes. Increases range from 1.5% to 6.0% for 1 bedroom and 4 bedroom properties, respectively, which compares to CPI inflation of 3.0% across this time period. Average rents have also increased for all property sizes between 2010 and 2017. Increases range from 11.4% (1 bedroom properties) to 19.0% (1 bedroom shared properties), and this compares to CPI inflation of 15.9% across this time period.

There have been increases at the top end of the market (upper quartile) for both 2 and 4 bedroom properties between 2016 and 2017 whilst the upper quartile for 3 bedroom properties has remained the same in 2017 compared to 2016, after increasing between 2015 and 2016.

Average 2 bedroom rents have been lower than the Scotland average in each year since 2010, with the average rent in 2017 being £599 per month, compared to the Scotland average of £643. The gap grew slightly between 2010 and 2014, before narrowing again, although these changes were relatively small.
TABLE 7 - Private Rents (£ Monthly), by Broad Rental Market Area, 2010 (year to end Sept)

<table>
<thead>
<tr>
<th>Broad Rental Market Area</th>
<th>1 Bedroom Properties</th>
<th>2 Bedroom Properties</th>
<th>3 Bedroom Properties</th>
<th>4 Bedroom Properties</th>
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<td>Dumfries and Galloway</td>
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</tbody>
</table>

Notes:
- Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
- Figures for rooms in shared properties represent “rent only”, i.e. exclude any payments for shared services.
- Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
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<td>378</td>
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1 Bedroom Shared Properties:

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<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
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</table>

Notes:

Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.

Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.

Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
### TABLE 9 - Private Rents (£ Monthly), by Broad Rental Market Area, 2012 (year to end Sept)

<table>
<thead>
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<th>Number of records</th>
<th>Lower Quartile</th>
<th>Median</th>
<th>Mean</th>
<th>Upper Quartile</th>
</tr>
</thead>
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Notes:
- Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
- Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.
- Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
<table>
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</tr>
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<td>Aberdeen and Shire</td>
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<tr>
<td>Angyll and Bute</td>
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<td>Fife</td>
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</table>

Notes:

Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.

Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.

Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
| TABLE 11 - Private Rents (£ Monthly), by Broad Rental Market Area, 2014 (year to end Sept) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 Bedroom Properties | 2 Bedroom Properties |
| 3 Bedroom Properties | 4 Bedroom Properties |
| Number of records | Lower Quartile | Median | Mean | Upper Quartile | Number of records | Lower Quartile | Median | Mean | Upper Quartile | Number of records | Lower Quartile | Median | Mean | Upper Quartile |
| Scotland | 5,197 | 375 | 435 | 472 | 550 | 11,206 | 450 | 550 | 596 | 460 |
| Aberdeen and Shire | 561 | 625 | 650 | 664 | 725 | 1,023 | 795 | 875 | 898 | 1,000 |
| Angus and Bute | 91 | 360 | 395 | 395 | 425 | 140 | 425 | 495 | 495 | 550 |
| Ayshires | 206 | 325 | 360 | 365 | 395 | 604 | 425 | 450 | 461 | 498 |
| Dumfries and Galloway | 114 | 350 | 375 | 369 | 390 | 363 | 410 | 450 | 442 | 475 |
| Dundee and Angus | 405 | 335 | 365 | 369 | 400 | 856 | 450 | 500 | 518 | 575 |
| East Dunbartonshire | 58 | 425 | 450 | 472 | 525 | 150 | 525 | 575 | 604 | 695 |
| Fife | 180 | 350 | 395 | 405 | 425 | 626 | 450 | 490 | 510 | 550 |
| Forth Valley | 218 | 350 | 393 | 387 | 425 | 540 | 435 | 495 | 506 | 550 |
| Greater Glasgow | 1,116 | 395 | 450 | 476 | 535 | 1,840 | 500 | 575 | 626 | 695 |
| Highland and Islands | 236 | 400 | 445 | 440 | 475 | 741 | 475 | 525 | 532 | 580 |
| Lothian | 950 | 515 | 550 | 582 | 625 | 1,602 | 630 | 705 | 779 | 840 |
| North Lanarkshire | 164 | 350 | 375 | 375 | 395 | 468 | 425 | 450 | 464 | 498 |
| Perth and Kinross | 200 | 360 | 393 | 389 | 420 | 462 | 460 | 500 | 520 | 575 |
| Renfrewshire / Inverclyde | 232 | 350 | 375 | 378 | 396 | 513 | 425 | 475 | 483 | 525 |
| Scottish Borders | 126 | 300 | 350 | 337 | 370 | 325 | 400 | 440 | 444 | 495 |
| South Lanarkshire | 188 | 350 | 375 | 380 | 400 | 468 | 448 | 475 | 494 | 550 |
| West Dunbartonshire | 56 | 360 | 395 | 390 | 425 | 145 | 450 | 475 | 479 | 525 |
| West Lothian | 96 | 425 | 450 | 448 | 475 | 338 | 500 | 543 | 543 | 575 |

| Number of records | Lower Quartile | Median | Mean | Upper Quartile |
| Scotland | 5,007 | 550 | 650 | 724 | 800 |
| Aberdeen and Shire | 422 | 850 | 1,100 | 1,089 | 1,300 |
| Angus and Bute | 82 | 500 | 650 | 640 | 750 |
| Ayshires | 346 | 495 | 500 | 569 | 625 |
| Dumfries and Galloway | 284 | 450 | 500 | 512 | 550 |
| Dundee and Angus | 303 | 550 | 650 | 668 | 750 |
| East Dunbartonshire | 114 | 695 | 795 | 799 | 890 |
| Fife | 415 | 525 | 590 | 609 | 675 |
| Forth Valley | 176 | 525 | 595 | 637 | 750 |
| Greater Glasgow | 512 | 568 | 695 | 796 | 900 |
| Highland and Islands | 436 | 550 | 600 | 625 | 700 |
| Lothian | 612 | 800 | 985 | 1,066 | 1,215 |
| North Lanarkshire | 200 | 495 | 550 | 551 | 598 |
| Perth and Kinross | 179 | 550 | 625 | 639 | 695 |
| Renfrewshire / Inverclyde | 276 | 500 | 595 | 622 | 700 |
| Scottish Borders | 218 | 450 | 515 | 528 | 580 |
| South Lanarkshire | 202 | 550 | 600 | 617 | 670 |
| West Dunbartonshire | 87 | 480 | 550 | 591 | 650 |
| West Lothian | 143 | 575 | 625 | 637 | 675 |

| Number of records | Lower Quartile | Median | Mean | Upper Quartile |
| Scotland | 1,938 | 272 | 300 | 317 | 350 |
| Aberdeen and Shire | 148 | 345 | 400 | 402 | 450 |
| Angus and Bute | 68 | 273 | 303 | 306 | 335 |
| Ayshires | 107 | 290 | 277 | 290 | 315 |
| Dumfries and Galloway | 74 | 255 | 272 | 269 | 285 |
| Dundee and Angus | 104 | 250 | 275 | 274 | 300 |
| East Dunbartonshire | 28 | 285 | 315 | 322 | 342 |
| Fife | 146 | 275 | 304 | 312 | 350 |
| Forth Valley | 108 | 270 | 305 | 308 | 354 |
| Greater Glasgow | 273 | 293 | 325 | 346 | 400 |
| Highland and Islands | 134 | 253 | 290 | 291 | 318 |
| Lothian | 333 | 300 | 328 | 338 | 375 |
| North Lanarkshire | 51 | 260 | 300 | 296 | 325 |
| Perth and Kinross | 54 | 250 | 257 | 281 | 300 |
| Renfrewshire / Inverclyde | 92 | 250 | 283 | 291 | 325 |
| Scottish Borders | 30 | 235 | 252 | 263 | 300 |
| South Lanarkshire | 74 | 272 | 300 | 303 | 325 |
| West Dunbartonshire | 49 | 260 | 282 | 283 | 305 |
| West Lothian | 65 | 260 | 285 | 294 | 325 |

Notes:
Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.
Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
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<th>3 Bedroom Properties</th>
<th>4 Bedroom Properties</th>
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<td><strong>Mean</strong></td>
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</table>

Notes:
- Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
- Figures for rooms in shared properties represent "rent only"; i.e. exclude any payments for shared services.
- Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
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<td>375</td>
<td>383</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>98</td>
<td>425</td>
<td>450</td>
<td>479</td>
</tr>
<tr>
<td>Fife</td>
<td>322</td>
<td>360</td>
<td>395</td>
<td>403</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>350</td>
<td>355</td>
<td>395</td>
<td>408</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>1,289</td>
<td>425</td>
<td>495</td>
<td>520</td>
</tr>
<tr>
<td>Highland and Islands</td>
<td>269</td>
<td>400</td>
<td>470</td>
<td>461</td>
</tr>
<tr>
<td>Lothian</td>
<td>944</td>
<td>575</td>
<td>625</td>
<td>653</td>
</tr>
<tr>
<td>North Lanarkshire</td>
<td>181</td>
<td>350</td>
<td>375</td>
<td>381</td>
</tr>
<tr>
<td>Perth and Kinross</td>
<td>240</td>
<td>390</td>
<td>400</td>
<td>408</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>352</td>
<td>350</td>
<td>375</td>
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<td>375</td>
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<tr>
<td>West Dunbartonshire</td>
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<td>400</td>
</tr>
<tr>
<td>West Lothian</td>
<td>93</td>
<td>450</td>
<td>475</td>
<td>470</td>
</tr>
</tbody>
</table>

**Notes:**
- Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
- Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.
- Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
TABLE 14 - Private Rents (£ Monthly), by Broad Rental Market Area, 2017 (year to end Sept)

<table>
<thead>
<tr>
<th>1 Bedroom Properties</th>
<th>2 Bedroom Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of records</strong></td>
<td><strong>Lower Quartile</strong></td>
</tr>
<tr>
<td>Scotland</td>
<td>4,942</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>446</td>
</tr>
<tr>
<td>Angilly and Bute</td>
<td>76</td>
</tr>
<tr>
<td>Ayshires</td>
<td>317</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>275</td>
</tr>
<tr>
<td>Dunilee and Angus</td>
<td>106</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>348</td>
</tr>
<tr>
<td>Fife</td>
<td>244</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>745</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>370</td>
</tr>
<tr>
<td>Highland and Islands</td>
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<td>North Lanarkshire</td>
<td>253</td>
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<tr>
<td>Perth and Kinross</td>
<td>118</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>203</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>169</td>
</tr>
<tr>
<td>South Lanarkshire</td>
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</tr>
<tr>
<td>West Dunbartonshire</td>
<td>60</td>
</tr>
<tr>
<td>West Lothian</td>
<td>133</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3 Bedroom Properties</th>
<th>4 Bedroom Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of records</strong></td>
<td><strong>Lower Quartile</strong></td>
</tr>
<tr>
<td>Scotland</td>
<td>445</td>
</tr>
<tr>
<td>Aberdeen and Shire</td>
<td>446</td>
</tr>
<tr>
<td>Angilly and Bute</td>
<td>76</td>
</tr>
<tr>
<td>Ayshires</td>
<td>317</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>275</td>
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<tr>
<td>Dunilee and Angus</td>
<td>106</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
<td>348</td>
</tr>
<tr>
<td>Fife</td>
<td>244</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>745</td>
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<td>Greater Glasgow</td>
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<td>642</td>
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<td>North Lanarkshire</td>
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<td>Perth and Kinross</td>
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<tr>
<td>Renfrewshire / Inverclyde</td>
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<td>West Dunbartonshire</td>
<td>60</td>
</tr>
<tr>
<td>West Lothian</td>
<td>133</td>
</tr>
</tbody>
</table>

Notes:
Total figures exclude any studio properties, properties with 5 or more bedrooms, or rooms rents associated with bed and breakfast lodgings.
Figures for rooms in shared properties represent "rent only", i.e. exclude any payments for shared services.
Note that some caution is needed when interpreting Scotland level findings. This is because whilst the underlying data aims to be representative of rents within each broad rental market area, no attempt has been made to apply any formal weighting techniques to account for any specific area-level sample sizes or structures when aggregating up to a single Scotland level figure.
Annex A - Trends in the Size of the Private Rented Sector in Scotland

The private rented sector in Scotland has more than doubled in size since 1999, and now accounts for more than a seventh of all homes in Scotland.\(^9\)

Chart A1 below shows the numbers of dwellings in Scotland by tenure since 1981. The number of private rented properties (including those living rent-free) has increased over the last ten years from an estimated 224,000 in 2006 to 394,000 in 2016. During this time period, the number of owner occupied properties rose from 1.49 million in 2006 to 1.52 million in 2009, before falling back to 1.46 million in 2013 then rising slightly to 1.48 million in 2016.\(^10\)


Annex B - Glossary of Terms

- **Broad Rental Market Area (BRMA)** – a Broad Rental Market Area for Local Housing Allowance purposes is defined as an area in which a person could reasonably be expected to live having regard to facilities and services for the purposes of health, education, recreation, personal banking and shopping, taking account of the distance of travel, by public and private transport, to and from those facilities and services. There are 18 Broad Rental Market Areas in Scotland. A map is given in the Section on Broad Rental Market Area Profiles. It is also possible to search for the Broad Rental Market Area associated with a particular postcode at http://lha-direct.voa.gov.uk/search.aspx.

- **Local Housing Allowance (LHA)** – the Local Housing Allowance (LHA) system provides a way of working out Housing Benefit for claimants who rent from a private landlord. Local authorities use LHA rates based on the size of household and the area in which a person lives to work out the amount of rent which can be met with Housing Benefit. Information on current LHA calculations and rates is published at http://www.scotland.gov.uk/Topics/Built-Environment/Housing/privaterent/tenants/Local-Housing-Allowance.

- **Local Reference Rents (LRR)** – the Local reference rent is a mid-point (reached by adding the highest and lowest non exceptional rents together and dividing by 2).

- **Lower Quartile** – the lower quartile is a way of summarising the spread of rental values into a single figure, and represents (for each particular area and size of property) the rental value at which 25% of rents are below this figure and 75% of rents are above it.

- **Market Evidence Database** – the database that holds lettings information collected as part of the Rent Service Scotland’s responsibility to administer the rent officer functions related to Housing Benefit (Local Housing Allowance and Local Reference Rents).

- **Mean** – a measure of central tendency often referred to as the average. Given a series of values the arithmetic mean is calculated by summing all these values together and dividing by the count of these values.

- **Median** – when a series of numbers are arranged by order of magnitude the median represents the middle value (i.e. 50% of rents are below this and 50% of rents are above it). Where there is an even number of values the median is the mean of the two values closest to value in the centre of that distribution.

- **Rent Officer** – an independent, statutory officer appointed by Scottish Ministers. They are responsible for providing advice to Local Authorities in assessing claims for Housing Benefit made before 7th April 2008; undertaking Fair Rent valuations for regulated tenancies; gathering rental information; analysing local rental markets to provide Local Authorities with Local Housing Allowance figures and maintaining the Rent Service Scotland ‘Market Evidence Database’.

- **Upper Quartile** – the upper quartile is a way of summarising the spread of rental values into a single figure, and represents the rental value at which 75% of rents are below this figure and 25% of rents are above it.
Annex C – Methodology (Source Data Collection, Sampling Methodology, Sample Sizes)

Data Source

This publication uses data from the Rent Service Scotland ‘Market Evidence Database’. This database is used to meet the needs of determining annual Local Housing Allowance levels and Local Reference Rent, and is data that has previously been published in the form of 30th percentile rental prices11.

The market evidence data on private rents is sourced through a variety of means, including:
- private landlord and letting agent returns,
- mailshot initiatives, and
- advertised rental information.

The database excludes any rents related to social housing, mid-market rents, halls of residence, and private tenancies known to be the subject of housing benefit and regulated tenancies. In the latest year, an estimated 97% of records were based on advertised rents, with the remainder being based on actual rents from landlord returns.

The data collected includes a minimum level of address, property attributes and tenancy details. Rents relating to studio/bedsit properties, properties with 5 or more bedrooms, and bed and breakfast lodgings have been excluded from this publication due to small sample sizes. Rents for bedrooms in shared properties are presented as ‘rent only’ figures, i.e. do not include the additional cost of shared services where these are known.

If a particular property has more than one piece of market evidence available in a given year, then only the most recent item of evidence for that year has been used in the average rent calculations for this publication.

Rent Officer Market Evidence Collection Methodology

The private rented sector is de-regulated, meaning that landlords are free to charge an open market rent for their property. There is currently no legal obligation for landlords or agents to provide Government, or any other organisations, with details of the rents achieved on their lettings. Therefore rent officers have to actively seek, collect, validate and maintain a suitable dataset.

Sample Sizes

There is no requirement for rent officers to collect 100% of rents that are agreed between landlord and tenant. Neither is it realistic to assume that all landlords and letting agents would be able to co-operate with this requirement.

Rent Officers instead aim to capture a representative sample of around 10% of private rents based on the total number of records obtained (the amount of records used in average rent calculations may be slightly less than this due to removal of any multiple records for a single property/address in a given year). Landlord registration data and

11 http://www.gov.scot/Topics/Built-Environment/Housing/privaterent/tenants/Local-Housing-Allowance/figures
Census data is used as a baseline for establishing and monitoring the total sample proportion that is aimed to be achieved.

As rent officers do not have access to every letting that takes place in the market the use of a random sample is not feasible, and given the variations in the size of the markets in each Broad Rental Market Area a simple quota based sample would be unlikely to produce representative results either. The sample should ideally reflect the profile of the market in terms of the type of property, its distribution, and the letting sources within each Broad Rental Market Area. There are no definitive measures for these so rent officers monitor local market activity and take every opportunity to acquire feedback from landlords, agents and tenants. This market intelligence means that rent officers are able to continually evaluate the composition of the list of rents used for LHA, and where necessary divert resources from their regular programme of data collection to address any perceived weakness in the data. This combined approach of regular and targeted collection based on market intelligence aims to produce a representative sample for each property size for each Broad Rental Market Area. This approach in turn reflects the structure of the legislation which allows for rent officer judgment on a number of these factors.

The private rented sector is very complex and is continually changing as it reacts to market forces. The overall target of a 10% sample therefore only represents a guide figure at Broad Rental Market Area level. Local knowledge, confidence testing and interpretation of other available data may be applied to refine the guide level. This contributes towards achieving a representative sample for each property size category at a Broad Rental Market Area level.

It is important to note that the data collected on individual rents may encompass different property types and addresses for each data collection year, and that this publication is not an attempt at providing a case-matched, tracked-sample or weighted-index approach to monitoring changes to rent levels over time. See Annex D for further information on methodological differences to the ONS Index of Private Rents.

The Broad Rental Market Area Profiles show the sample sizes for each rental area. It can be seen that there have been some variations in the number of records by rental areas over time, and also the proportions by size of property. Some of this may be due to changes in the underlying rental stock over time, and some may be due to sampling variations over time.

Table C1 and Chart C1 illustrate the different sample data profiles by rental market area. It can be seen that the sample data profiles differ by rental area. For example for Dumfries and Galloway, 1 bedroom properties make up 14% of all sample records and 3 bedroom properties make up 24% of the total. This compares to Perth and Kinross for which 27% of records are 1 bedroom properties, and 13% of records are 3 bedroom properties. This emphasises that it is generally not appropriate to compare an overall “average” rent figure (averaged across all property sizes) between different areas of the country.
### TABLE C1 - Sample Sizes by Broad Rental Market Area and size of property, 2017 (year to end Sept)

<table>
<thead>
<tr>
<th>Area</th>
<th>1 bedroom shared</th>
<th>1 bedroom</th>
<th>2 bedrooms</th>
<th>3 bedrooms</th>
<th>4 bedrooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
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<td>1,561</td>
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<td>Aberdeen and Shire</td>
<td>98</td>
<td>756</td>
<td>1,448</td>
<td>446</td>
<td>213</td>
</tr>
<tr>
<td>Argyll and Bute</td>
<td>45</td>
<td>107</td>
<td>180</td>
<td>76</td>
<td>19</td>
</tr>
<tr>
<td>Ayrshires</td>
<td>146</td>
<td>351</td>
<td>786</td>
<td>317</td>
<td>97</td>
</tr>
<tr>
<td>Dumfries and Galloway</td>
<td>98</td>
<td>110</td>
<td>330</td>
<td>190</td>
<td>54</td>
</tr>
<tr>
<td>Dundee and Angus</td>
<td>200</td>
<td>369</td>
<td>728</td>
<td>275</td>
<td>115</td>
</tr>
<tr>
<td>East Dunbartonshire</td>
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<td>169</td>
<td>106</td>
<td>42</td>
</tr>
<tr>
<td>Fife</td>
<td>162</td>
<td>325</td>
<td>611</td>
<td>348</td>
<td>125</td>
</tr>
<tr>
<td>Forth Valley</td>
<td>137</td>
<td>321</td>
<td>491</td>
<td>244</td>
<td>75</td>
</tr>
<tr>
<td>Greater Glasgow</td>
<td>346</td>
<td>1,343</td>
<td>2,443</td>
<td>745</td>
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<tr>
<td>Highland and Islands</td>
<td>157</td>
<td>243</td>
<td>738</td>
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</tr>
<tr>
<td>Lothian</td>
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<td>2,025</td>
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<td>177</td>
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<td>233</td>
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<td>253</td>
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<tr>
<td>Perth and Kinross</td>
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<td>422</td>
<td>118</td>
<td>38</td>
</tr>
<tr>
<td>Renfrewshire / Inverclyde</td>
<td>102</td>
<td>373</td>
<td>551</td>
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</tr>
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<td>South Lanarkshire</td>
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<td>West Dunbartonshire</td>
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<td>210</td>
<td>60</td>
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</tr>
<tr>
<td>West Lothian</td>
<td>75</td>
<td>103</td>
<td>396</td>
<td>133</td>
<td>48</td>
</tr>
</tbody>
</table>

Notes:
- Total figures exclude any studio properties, properties with 5 or more bedrooms, or room rents associated with bed and breakfast lodgings.
- If there is more than one piece of market evidence for a particular address in a given year, then only the most recent piece of evidence is counted.

### CHART C1 - 2017 Sample Data Profiles
It is also important to note that there are some sample data profiles that have changed over time by property size, which may also introduce some bias into comparing overall Broad Rental Market Area averages over time.

Chart C2 shows an example of this for Argyll and Bute, for which the sample data profile has changed over time both in the total number of records and the proportion in each property size category. The proportion of records relating to 1 bedroom shared properties has increased from 3% to 11% from 2010 to 2017, whilst the proportion of records relating to 2 bedroom properties has decreased from 43% to 37% from 2010 to 2016 and back to 42% in 2017. This would add bias to the trends if an overall “average” rent figure was calculated (averaged across all property sizes) each year.

Chart C3 shows the proportions of the total samples that are within each Broad Rental Market Area each year, by property size. For most property sizes each rental area has a relatively consistent proportion each year, which gives some reassurance that averages for each property size (but not across all property sizes) can be presented at a Scotland level without bias appearing in the trend results.
Annex D - Comparability to Other Government Sources of Rental Data

ONS Index of Private Housing Rental Prices

The ONS Index of Private Housing Rental Prices (IPHRP)\(^{12}\) is a quarterly experimental price index. It tracks the prices paid for renting property from private landlords in Great Britain, including an index at a Scotland level.

Whilst the ONS Index uses same raw data as the Rent Service Scotland ‘Market Evidence Database’, there are some important differences to how the data are processed and used:

- The ONS Index uses the rental data to create a matched-sample dataset to ensure that only like-for-like properties are compared over time.
- The ONS matched-sample dataset retains rental records for a period of time (an assumption based on average tenancy length), and it is therefore an attempt to measure rental price changes for all rents and not just a measure of recent rental market evidence.
- The ONS Index is mix-adjusted in that it uses expenditure weights to adjust to the overall distribution of types of properties in the rental market (by expenditure).
- The Index does not provide any information on actual rental levels, and the Index values provided are not available at a sub-Scotland basis.

Full details of the methodology used to calculate the IPHRP can be found in the June 2013 IPHRP article at http://webarchive.nationalarchives.gov.uk/20160106022839/http://www.ons.gov.uk/ons/rel/hpi/index-of-private-housing-rental-prices/historical-series/iphrp-article.html.

This article can also be supplemented by the January 2015 article ‘Improvements to the measurement of Owner Occupiers’ Housing Costs and Private Housing Rental Prices’ available at http://webarchive.nationalarchives.gov.uk/20160106041638/http://www.ons.gov.uk/ons/guide-method/user-guidance/prices/cpi-and-rpi/index.html.

ONS have also recently produced an article on comparing measures of private rental growth in the UK, available at https://www.ons.gov.uk/economy/inflationandpriceindices/articles/comparingmeasuresofprivaterentalgrowthintheuk/quarter3jultosept2017.

Given the different methodologies used we would not always expect the ONS Index and Private Sector Rent Statistics for Scotland to show the same results. The ONS Index results provide estimates of like-for-like changes over time in rental prices across all private rented households (whether existing tenants or new lets) in Scotland, but do not provide any information on actual rent levels or on trends below the Scotland level. Whereas the Private Sector Rent Statistics for Scotland publication allows an assessment of market-evidence average rents, along with changes over time at a BRMA level and by property size, although some caution is needed in interpreting the results given that the composition and quality of private rental stock can vary by area and can change over time.

Rent Service Scotland 30th Percentile Rent Figures

Annual information on the 30th percentile of weekly private sector rents by bedroom size is published on the Scottish Government website13, alongside corresponding information on Local Housing Allowance (LHA) Rates.

There may be a small number of minor differences in the data that was used for previous 30th percentile calculations compared with the data used for this publication because the Market Evidence Database is a live database and therefore over time there may be some records that are updated to reflect that more up-to-date information becomes available, or where additional statistical quality assurance has been carried out.

The 30th percentile rents are also presented as weekly rents, rather than the calendar month figures presented in this statistical publication. Monthly rents are seen as a more user friendly way of presenting the data in this publication given that private rents are typically paid in periods of calendar months.

Private Rental Market Statistics for England

The Valuation Office Agency (VOA) publish Private Rental Market Statistics for England14, which is published twice-yearly. Whilst it presents similar looking statistics to this publication, there are some differences which may affect any comparisons. In particular, rent for 1 bedroom shared properties is presented as gross rather than net of any shared services, and also properties with 5 or more bedrooms are included, not excluded. These differences may impact on any comparisons when looking at average rents for these types of properties.

Private Rental Market Statistics for Wales

The Welsh Government publish annual statistics15 on rents paid in the private sector in Wales. The Welsh report includes statistics that look similar to those presented in this publication, however there are some differences in the underlying data which may affect comparisons. In particular, rent for 1 bedroom shared properties is presented as gross rather than net of any shared services.

13 http://www.gov.scot/Topics/Built-Environment/Housing/privaterent/tenants/Local-Housing-Allowance/figures
An Official Statistics publication for Scotland

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e-mail: statistics.enquiries@scotland.gsi.gov.uk

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The data collected for this statistical bulletin
☒ may be made available on request, subject to consideration of legal and ethical factors. Please contact Esther.Laird@gov.scot for further information.

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