LIVING IN THE PRIVATE RENTED SECTOR IN 2025

The Voice of the Tenant Survey Scotland (Wave 2)

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SAFE DEPOSITS SCOTLAND CHARITABLE TRUST


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Executive summary

This is the second wave of the SafeDeposits Scotland Charitable Trust's Voice of the Tenant Survey, which examines people's experience of living in the Scottish private rented sector. It is a continuous survey that will be conducted annually with a sample of over 1,000 tenants. The survey complements the Trust's Voice of the Landlord Survey Scotland.

WHO LIVES IN THE PRIVATE RENTED SECTOR?

- Younger people are more likely to be renters; just over half of all tenants are aged 18-34.
- Tenants from ethnic minority backgrounds make up 28% of Scotland's private rented sector.
- Around four in ten tenants (39%) have at least one dependent child at home.
- Four in ten tenants (42%) have an income of over £40,000 per annum, whilst 16% have a household income of under £20,000 per annum.
- Nearly three quarters (74%) of tenants are in employment, 5% are retired.
- Around one-third (31%) of tenants are living with a long-term mental or physical health condition.
- Seventy-seven percent of tenants live in a city, with 11% living in rural areas or islands.
- Nearly two-thirds of tenants live in a flat or apartment, nearly a third (32%) live in a house, and 5% live in a bedsit or room in a shared house.
- Forty-three percent of tenants have a Private Residential Tenancy, while just under a third (31%) have an older form of tenancy.

AFFORDABILITY

- The average cost of rent varies according to location and is the most expensive in cities and large towns, particularly Edinburgh and Glasgow.
- Almost six in ten tenants (59%) have not had their rent increased within the last 12 months.
- Nearly one in three tenants (29%) struggled to afford their rent last month.
- One in ten tenants have fallen behind in rent by at least one month, and over half of those in arrears are two months or more behind.
- In August 2025, over a third (34%) of private renters found it difficult to afford utility bills.
- Tenants aged 45-59, those living with a long-term physical or mental health condition, and those living in a low-income household are more likely to struggle to afford rent and bills.
- Almost half of all tenants (47%), said they regularly cut back on household essentials to pay their rent.
- Most tenants aspire to home ownership, with 76% expressing a desire to buy. However, less than half (49%) are confident they will not be lifelong renters.

SECURITY OF TENURE

- Most tenants have lived in their current rental accommodation for relatively short periods, with nearly one third (31%) having moved into their property in the last 12 months, and 57% in the past two years.
- Many tenants (47%) said they would like to move but feel unable to.

- Most tenants (71%) report being satisfied with their housing experience.
- Tenancies typically end due to changing property needs, changes in relationships/family reasons, or other personal circumstances.
- Around 43% of tenants have moved due to disadvantages associated with their tenancy, such as poor conditions, unaffordable rent, or eviction.
- Most tenants (63%) viewed between one and three properties when searching for their last rental, while 16% viewed six or more properties.
- Over half of tenants (51%) find it difficult to find a rental property.
- A significant proportion of tenants faced at least one challenge when searching for a rental property. Four in ten tenants reported finding an affordable property as a key challenge.
- Around three-quarters of tenants (76%) feel secure in their home.
- Most tenants (71%) enjoy a positive relationship with their landlord or letting agent.

PROPERTY CONDITIONS

- Over half of all tenants (61%) rate the overall condition of their property as good or excellent condition, with only 9% of tenants reporting their property was in poor condition.
- The findings show that the condition of the property is a key factor affecting satisfaction rates among tenants.
- Over half of tenants (58%) experienced an issue with their property in the last 6 months. A significant majority (90%) report the problem to their landlord or letting agent and in most cases, the issue is fully or partially addressed.
- For tenants who did not report issues to their landlord or letting agent, over a third (34%) felt like the problem did not seem serious enough, and a quarter of tenants did not think anything would be done about it.
- When issues are unaddressed by landlords and letting agents, only a small minority of tenants will escalate complaints to the First-tier Tribunal or their local council.
- For tenants who took their complaint to the First-tier Tribunal or their local council, over 94% were happy with the result.
- Nearly four in ten tenants (37%) said they would not know where to go next if they had a housing problem that a landlord or letting agent failed to address.
- Only 44% of tenants recall being presented with 'Easy read notes for the Scottish Government model tenancy agreement' or the 'Private Residential Tenancy Statutory Terms Supporting Notes', despite it being a legal requirement.

EXPERIENCES OF DIFFERENT GROUPS OF TENANTS

- Renters from ethnic minority groups are more likely to experience challenges around affordability, searching for a property, and level of satisfaction.
- Nearly a quarter (24%) of all tenants report being in receipt of benefits to help pay their rent. This group is more likely to struggle with issues relating to affordability, insecurity, and property conditions.

- Older renters enjoy lower rental costs on average than younger age groups. Younger private renters report particular access challenges, with nearly half (46%) of this group reporting their main challenge is finding an affordable property.
- Tenants living with long-term mental or physical health conditions face a range of specific challenges. For instance, a quarter (25%) of this group require home adaptations to make their property more inclusive and accessible, and 26% find it difficult to find a rental property.
- Women represent over half of tenants (56%) in Scotland's private rented sector. Women are more likely to struggle with issues related to housing insecurity and affordability. Over half (53%) of tenants in this group cut day-to-day spending to pay their rent.
- Over a third (34%) of tenants living in Edinburgh and Glasgow find it difficult to afford their rent and over half (51%) cut spending to pay their rent.

ATTITUDES TOWARDS ENERGY EFFICIENCY IN THE PRIVATE RENTED SECTOR

- Most tenants (88%) consider energy efficiency as important when choosing a rental property.
- In August 2025, around one in three tenants found it difficult to afford energy bills.
- Around one in five tenants (21%) have either applied or been offered financial support (e.g. grants or government funding) to help with their bills or make their home more energy efficient.
- Nearly half of tenants (47%) do not know the EPC rating of their rental property.
- Forty-five percent of tenants report that the energy efficiency of their property could be improved.
- However, 63% of tenants had not asked their landlord or letting agent to make energy efficiency improvements. A majority (51%) reported that they were worried about repercussions, including a possible rent increase or being perceived as a hassle.
- For tenants who did ask their landlord/letting agent to make energy efficiency improvements, 82% were satisfied with the response.
- Most tenants (80%) have taken at least one step to improve the energy efficiency of their rented home.
- Most tenants (88%) would support their landlord making energy efficiency upgrades even if it meant temporary disruption.

Introduction

This is the second edition of the SafeDeposits Scotland Charitable Trust's Voice of the Tenant Survey, which explores the experiences of people living in the Scottish private rented sector. In total, 1,004 tenants were asked various questions related to affordability, tenure security and property conditions. The survey will be repeated annually to track changes and trends over time. This report outlines the findings from the second wave, carried out in September 2025. Each wave will include additional questions on a key topical issue. This wave included questions on energy affordability and efficiency in the private rented sector in Scotland. Where relevant, comparisons are made with findings from Wave 1.

METHODS

- This second wave surveyed 1,004 tenants across Scotland who rent from a letting agent or private landlord. Participants were sampled external to SafeDeposits Scotland.
- All respondents were aged 18+ years.
- Fieldwork ran from 5th September to 20th September 2025.
- Each wave includes a key topical issue; this wave looks at tenants' experiences and attitudes towards energy affordability and efficiency within the Scottish private rented sector.
- Using data from the Scottish Household Survey (SHS), the Census and syndicated sources, the final data is representative of private rental households in Scotland in terms of age, gender, region and monthly rental cost brackets.
- When exploring how experiences vary for different groups of tenants, this study reports on statistically significant data. This means we can be reasonably confident that the findings are representative of the wider tenant population in Scotland.
- In this report, statistics may not add to 100% due to rounding or non-responses.

THIS REPORT

This report is split into six chapters.

- The first looks at the characteristics and geographical distribution of people renting privately in Scotland.
- The second looks at issues relating to affordability.
- The third looks at security of tenure and accessing private rented housing.
- The fourth addresses housing standards and requesting repairs.
- The fifth looks at how these experiences vary for different groups of tenants.
- The final section looks at tenant experience and attitudes towards energy affordability and efficiency within the Scottish private rented sector.

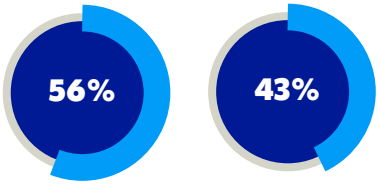
CHAPTER ONE

Who lives in the private rented sector?

SUMMARY

The Scottish private rented sector is home to a diverse range of tenants. Around half of all renters are young people aged 18-34, and more than a quarter come from ethnic minority backgrounds. While many tenants are in work, nearly one in five are not currently in employment or education. Geographically, the sector is concentrated, with over half of all tenants living in Edinburgh or Glasgow. This diversity highlights the importance of understanding how experiences in the private rented sector differ across age, ethnicity, employment status, and location.

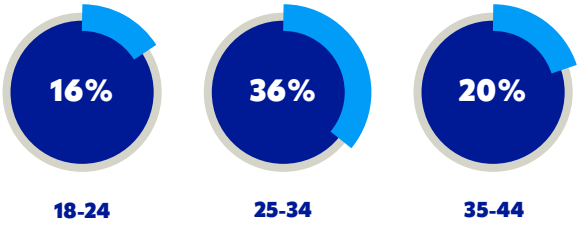
Gender

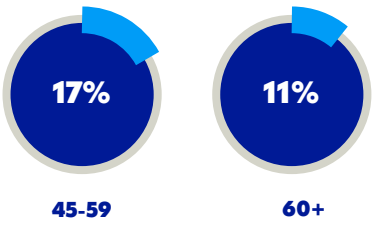




Age

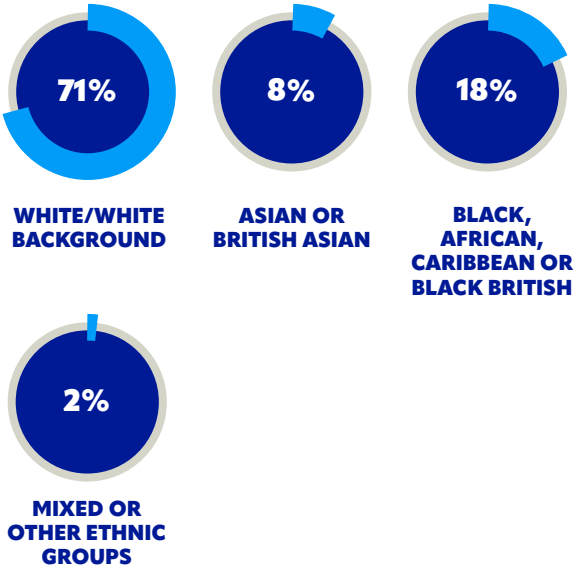
Just over half of private renters in Scotland are younger people aged 18-34. More young people in Scotland are turning to private renting due to limited access to social housing and homeownership.[1]





Ethnicity

Tenants from ethnic minority backgrounds make up 28% of Scotland's private rented sector. Previous research has shown that the private rented sector has the highest proportion of minority ethnic groups relative to other tenures.[2]

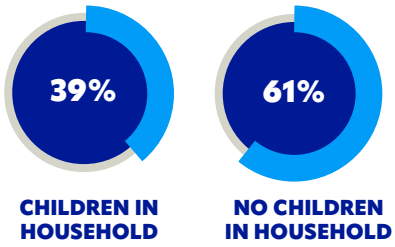


1 ESRC Centre for Population Change Connecting Generations, (June 2025), Scotland's 'generation rent' Policy Briefing

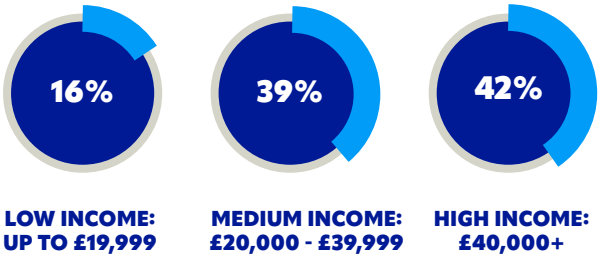
2 Scottish Government, (2021) 'Housing needs of minority ethnic groups: evidence review'

Children

Nearly one in four private renters have at least one dependent child at home.

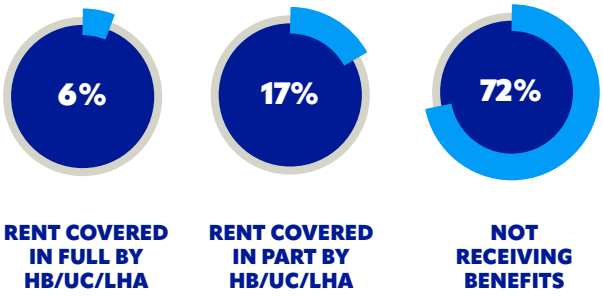


Income



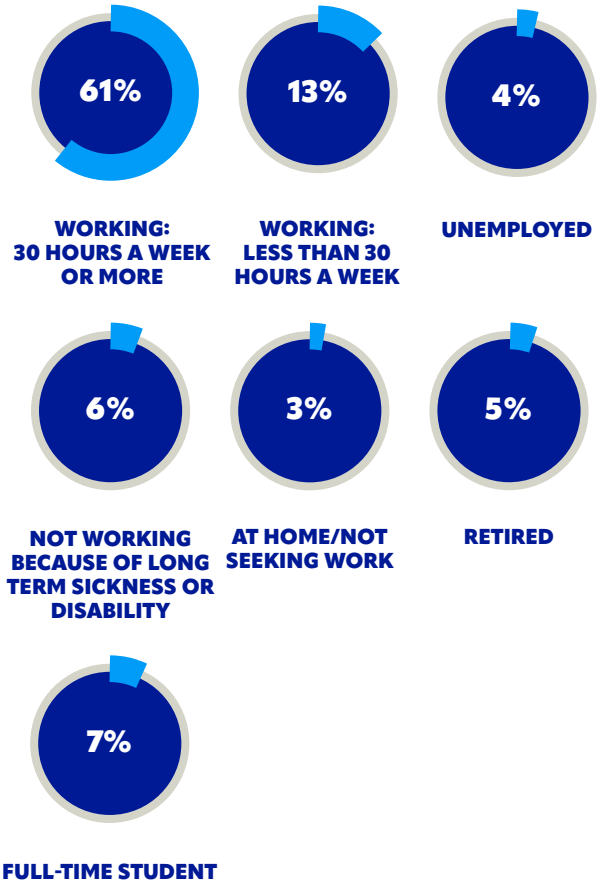
Benefits

Twenty-four percent of private renters report being in receipt of benefits to help pay their rent.



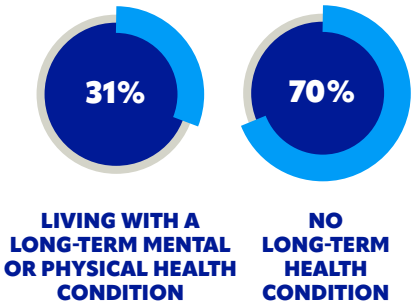
Employment status

Around three-quarters of tenants are working, but nearly a fifth are not in employment or education.



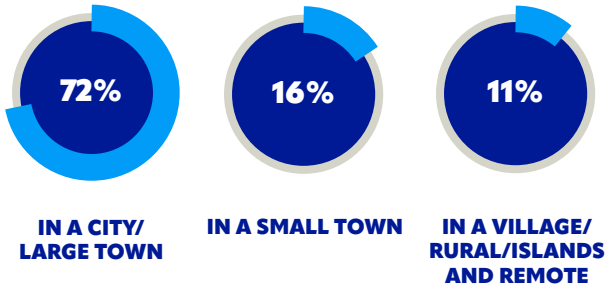
Health status

Around one-third of tenants are living with a long-term mental or physical health condition.



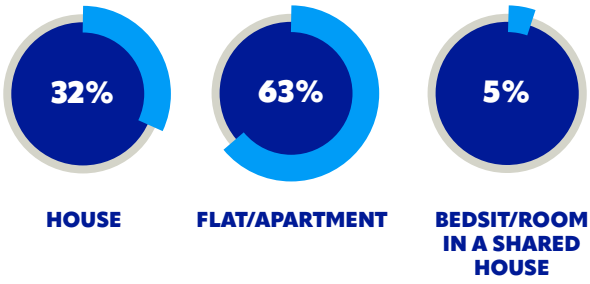
Location

Around seven in ten tenants live in an urban environment.



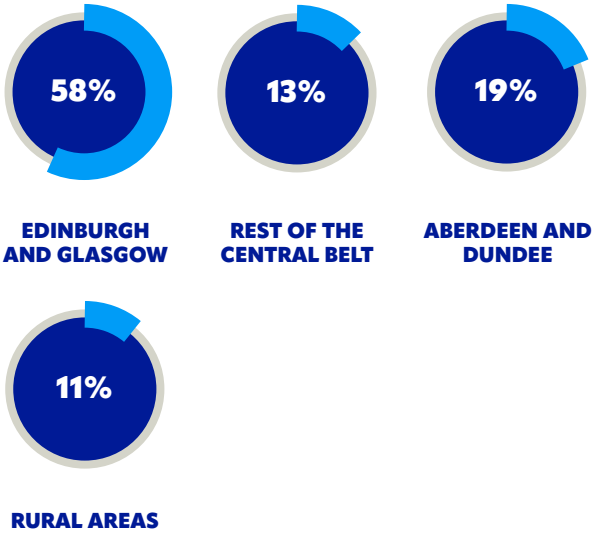
Type of property

Nearly two-thirds of tenants live in a flat or apartment.



Geography

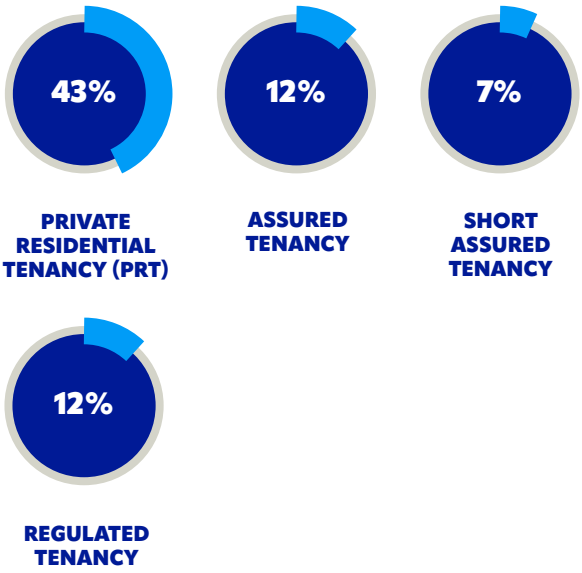
There are geographical variations in the size and nature of the private rented sector across Scotland. Over half of all tenants live in either Edinburgh or Glasgow.



Type of tenancy

The Private Housing (Tenancies) (Scotland) Act 2016 introduced Private Residential Tenancies (PRT) and replaced the assured tenancy regime for new private lets from 31st December 2017. Older forms of tenancy are continuing to operate until terminated by a landlord or tenant.

The findings show that in September 2025, just under a third of tenants were still on the previous tenancy regime.



Renting via a landlord or letting agent

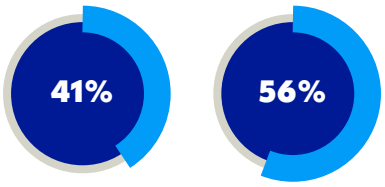
Nearly half of all tenants rent their property via a letting agent.



Joint tenancies

In the private rented sector, a joint tenancy is when multiple tenants share a property and are equally responsible for the tenancy. In Scotland, over two-fifths have a joint tenancy.

Currently, the Private Residential Tenancy (PRT) does not allow one joint tenant to end the tenancy. However, under the Housing (Scotland) Act (2025), one joint tenant can end their tenancy with appropriate notice, when other tenants want to stay.[3]





3 Scottish Government, (September 2025), Housing (Scotland) Bill

CHAPTER TWO

Affordability

SUMMARY

While the proportion of tenants that are struggling to afford their monthly rent has fallen slightly since last year, the findings show that the affordability of rental accommodation continues to be a key area of concern for many tenants. Almost one in three tenants are finding it difficult to afford their rent, and just under half are regularly cutting back on household essentials to meet their rental payments. While most tenants aspire to owning their own home, many expect to be lifelong renters.

RENTAL COSTS

Tenants were asked for their total monthly rent (excluding bills). In September 2025, the average cost of renting a home in the private rented sector in Scotland was £870. The cost of rent varies according to location, and the most expensive rents are found in cities and large towns.

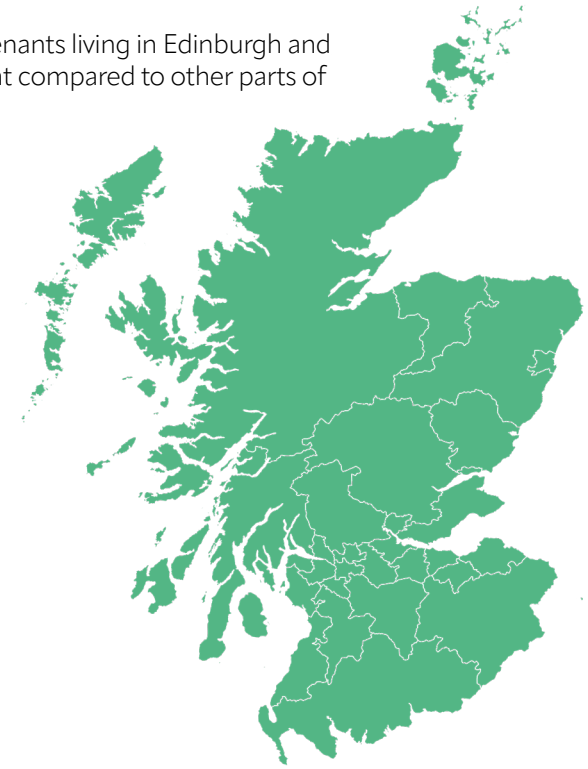
	AVERAGE MONTHLY RENT
All tenants	£870
Live in a city/large town/suburbs	£924
Live in a small town	£743
Live in village/rural/islands and remote	£725



REGIONAL BREAKDOWN

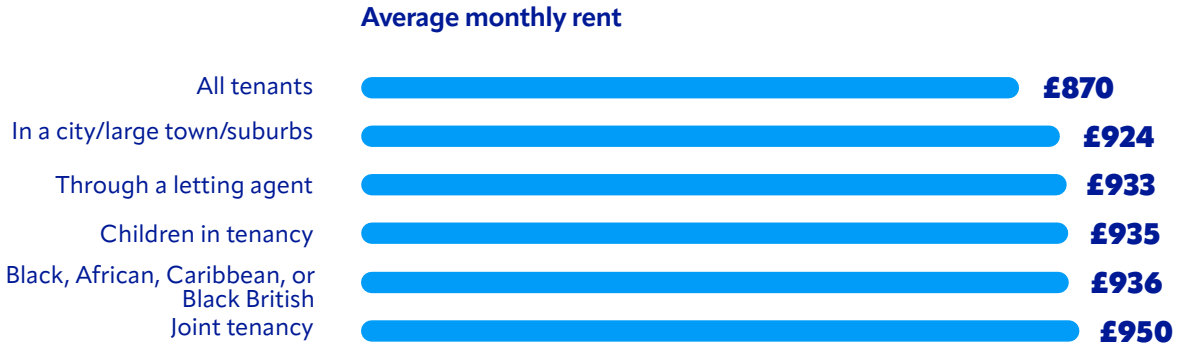
There are regional differences in the cost of rent. Tenants living in Edinburgh and Glasgow are paying over £200 more in monthly rent compared to other parts of Scotland.

	AVERAGE MONTHLY RENT
Edinburgh & Glasgow	£966
Rest of the Central	£747
Aberdeen & Dundee	£747
Rural areas	£715



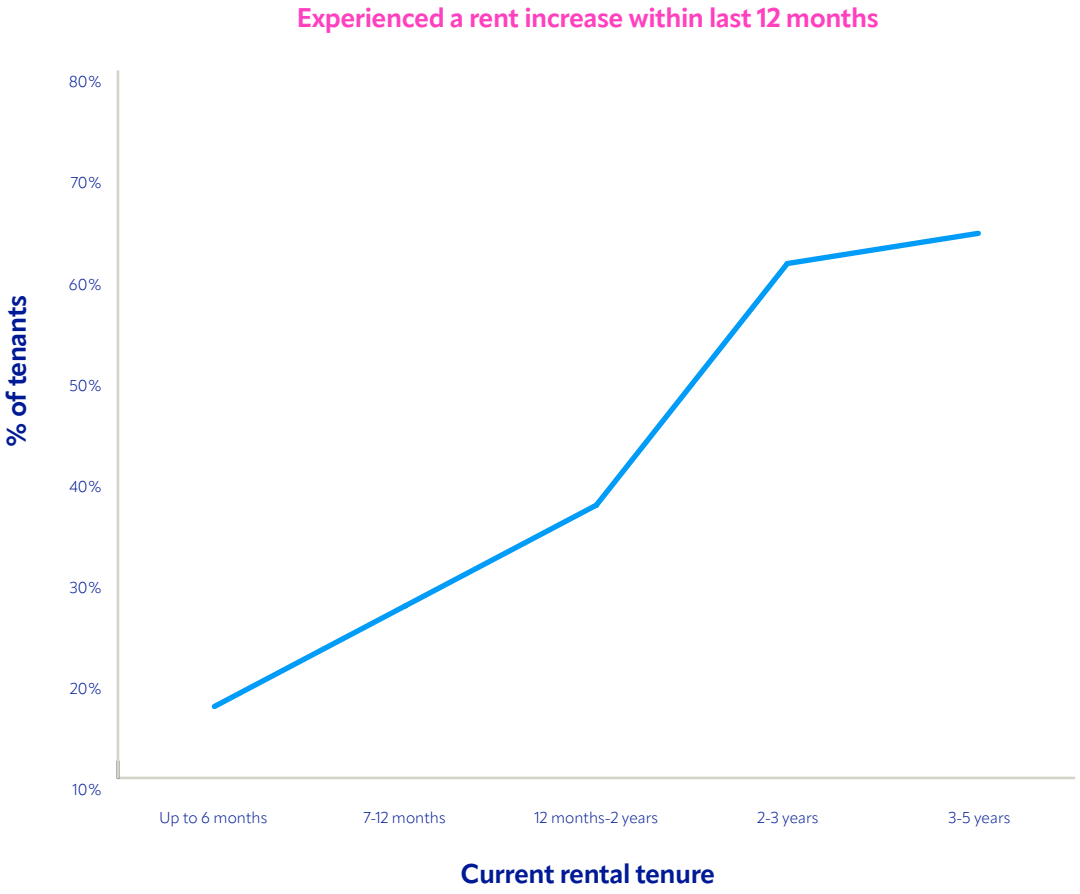
VARIATIONS IN AVERAGE MONTHLY RENT BY TENANT GROUP

Rental costs are higher than average for some tenant groups, including tenants with joint tenancies, those identifying as Black, African, Caribbean or Black British and those with children in the household.



RENT INCREASE

Overall, 41% of tenants reported a rent increase within the last 12 months, whilst 59% reported no increase. Nearly half of those reporting an increase live in Edinburgh or Glasgow. The findings show that the longer the length of tenure, the more likely a tenant will experience a rent increase.



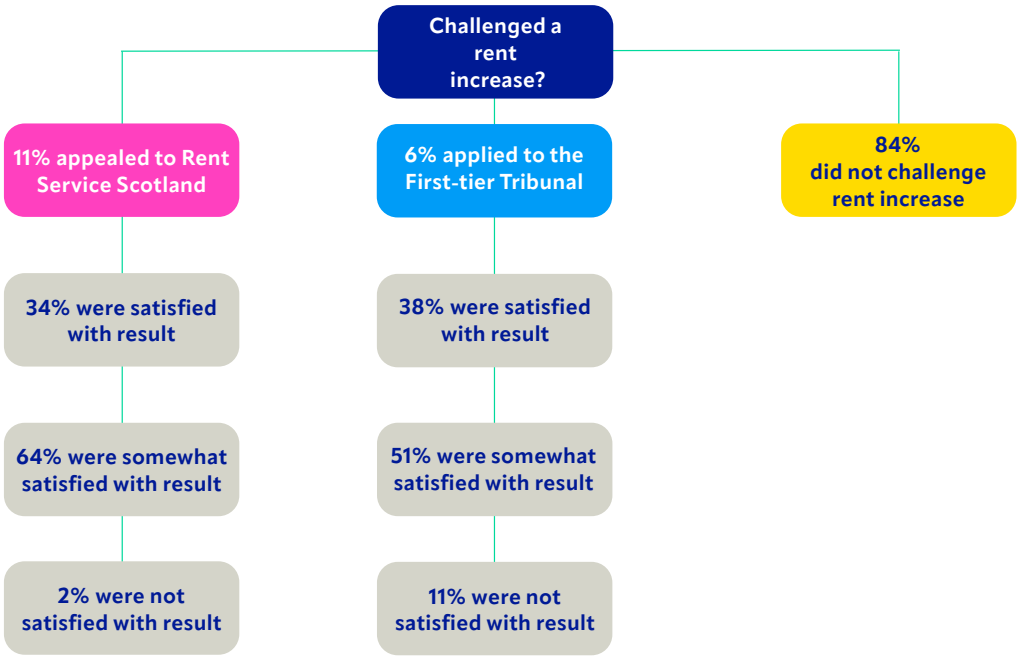
CHALLENGING RENT INCREASES

Tenants in Scotland have the power to challenge rent increases. Those with Private Residential Tenancies can apply to Rent Service Scotland and may subsequently appeal to the First-tier Tribunal if they disagree with the rent officer's decision. Those with older forms of tenancy, such as Assured or Short Assured Tenancies, can apply to the First-tier Tribunal (Housing and Property Chamber).

The survey asked tenants whether they had ever challenged a rent increase by applying to either of these two bodies.

Most tenants (84%) had not contested a rent increase. Although the proportion of tenants challenging rent increases has risen slightly since last year (12%), only 6% approached the First-tier Tribunal and 11% contacted Rent Service Scotland to formally challenge a rent increase.

The survey also asked tenants who had challenged a rent increase whether they were satisfied with the result of the process. The levels of satisfaction were similar for both bodies; most tenants were satisfied or somewhat satisfied with the result of challenging their rent increase.

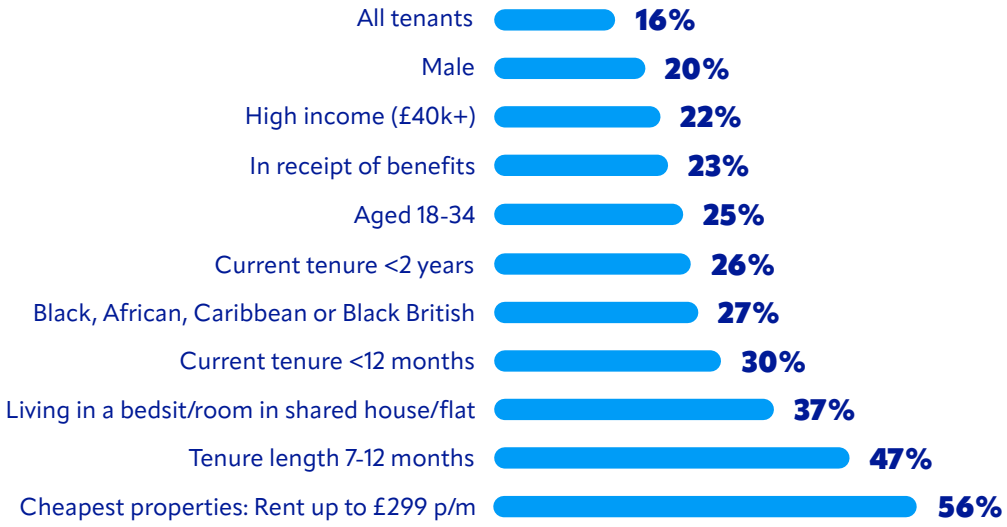


For both bodies, in 2024, around 35% of tenants were not satisfied with the result of the process, versus only 14% of tenants in 2025, indicating tenants are now happier with the outcome.[4] Recent research shows that tenants who challenged a rent increase through Rent Service Scotland typically had the proposed rise reduced by approximately half through the rent officer's decision.[5] While these systems are effective when used, Consumer Scotland found that tenants have limited awareness of when and how they can challenge rent increases that they consider too high.[6]

4 Note small sample size for applicants to the First-tier Tribunal (n=31).
5 Living Rent, (March 2025), Challenging Rent Increases
6 Consumer Scotland, (September 2025), A Fairer Rental Market: Exercising tenancy rights in Scotland's private rented sector'

Certain groups of tenants were more likely to challenge a rent increase. Over half of tenants living in the cheapest properties are likely to have challenged a rent increase. Additionally, those who have lived in their current rental property for less than two years are more likely to challenge a rent increase, particularly those who have had a rent increase within the first seven to twelve months of living there.

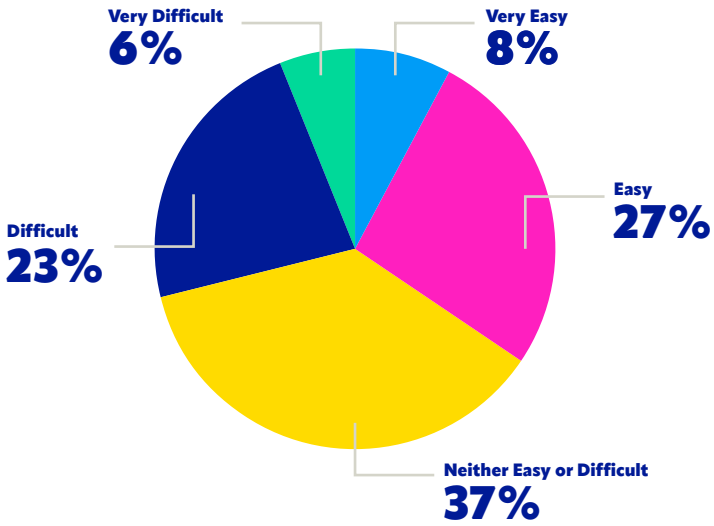
% of tenants who have challenged a rent increase



MEETING MONTHLY RENTAL COSTS

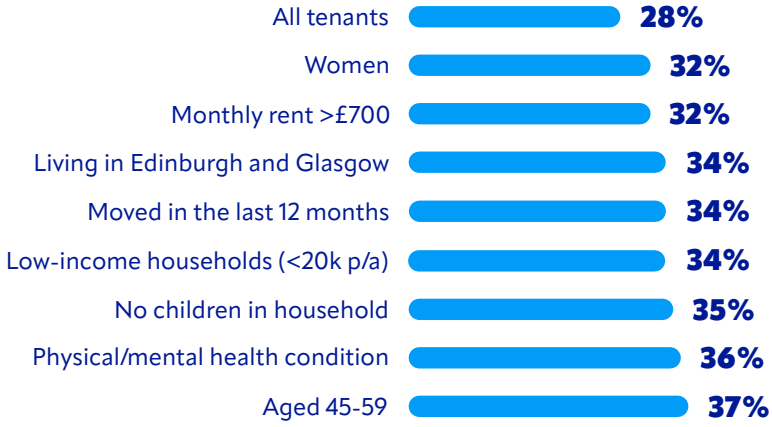
While over a third (35%) of tenants said it was easy to afford the rent in August 2025, 29% of tenants struggled to pay their rent that month. This shows a slight decrease since August 2024, where 32% struggled to pay their rent that month.

In August 2025, how easy or difficult was it for you to afford the monthly rental cost?



Some tenant groups are finding it particularly difficult to afford their rent, including, tenants aged 45-59, those with physical/mental health conditions, and those in a low-income household.

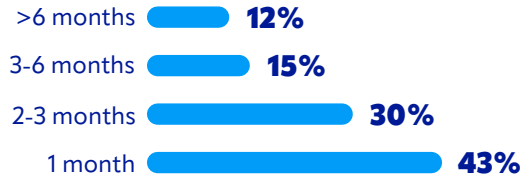
% who found it difficult to afford the rent last month



ARREARS

The majority of tenants (87%) are up to date with their rent payments. Around one in ten tenants have fallen behind by at least one month, and among those in arrears, over half are two months overdue or more.

How far behind in rent are you?



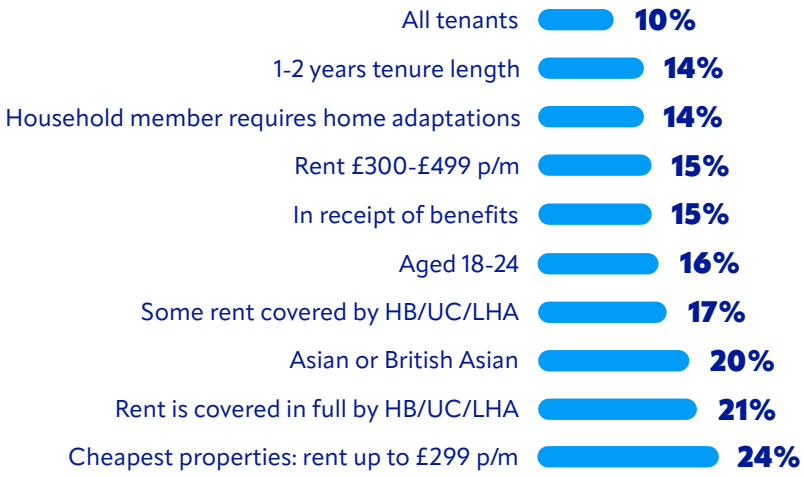
The findings show that the vast majority of tenants (89%) in rent arrears have taken steps to address the problem, most often by notifying and arranging a repayment plan with their landlord or letting agent. Tenants are more likely to seek advice from informal sources such as friends and family rather than official channels like advice agencies or the local council.

Steps taken to address rent arrears: September 2025



Certain tenant groups are significantly more likely to be in rent arrears. One in five Asian or British Asian tenants, and tenants in receipt of benefits are behind in their rent. Nearly a quarter of tenants renting the cheapest properties are also in rent arrears.

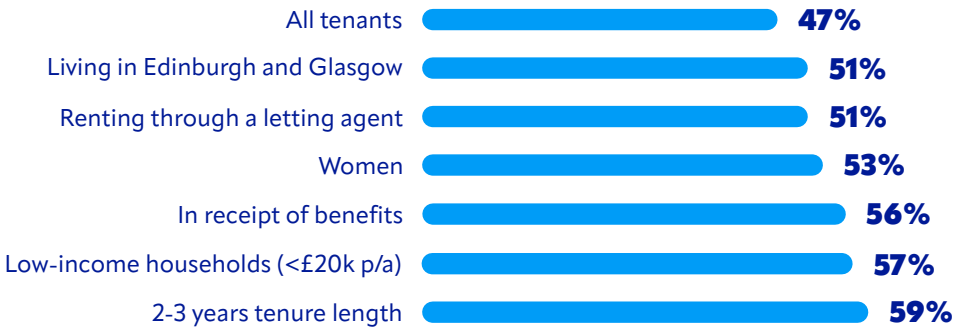
% of tenants in rent arrears



CUTTING ON HOUSEHOLD ESSENTIALS

Almost half of all tenants (47%) said they regularly cut back on household essentials such as food, heating, and clothing in order to pay their rent. Similar to last year, this proportion is higher for tenants who have lived in their rental property between two to three years, those on low income, tenants in receipt of benefits, and women.

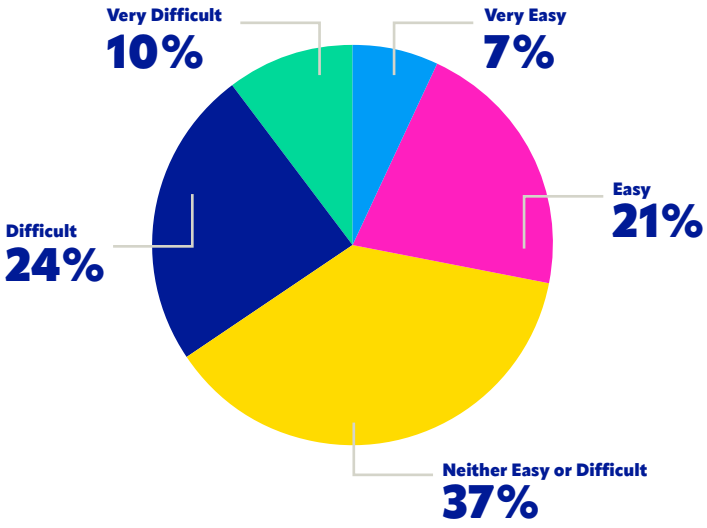
Do you regularly cut back on household items to pay rent?



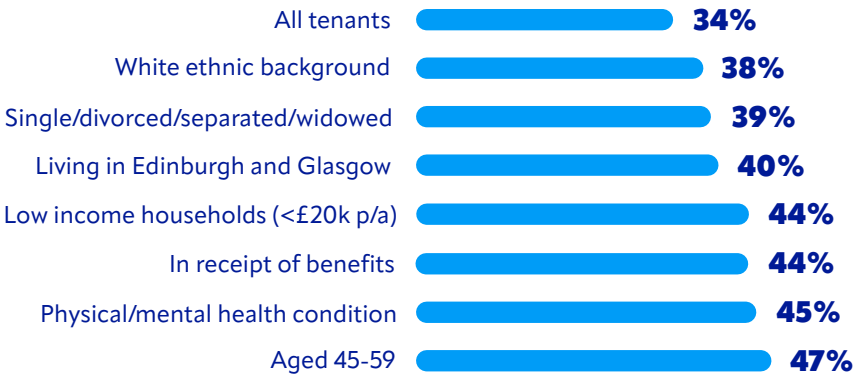
UTILITY BILLS

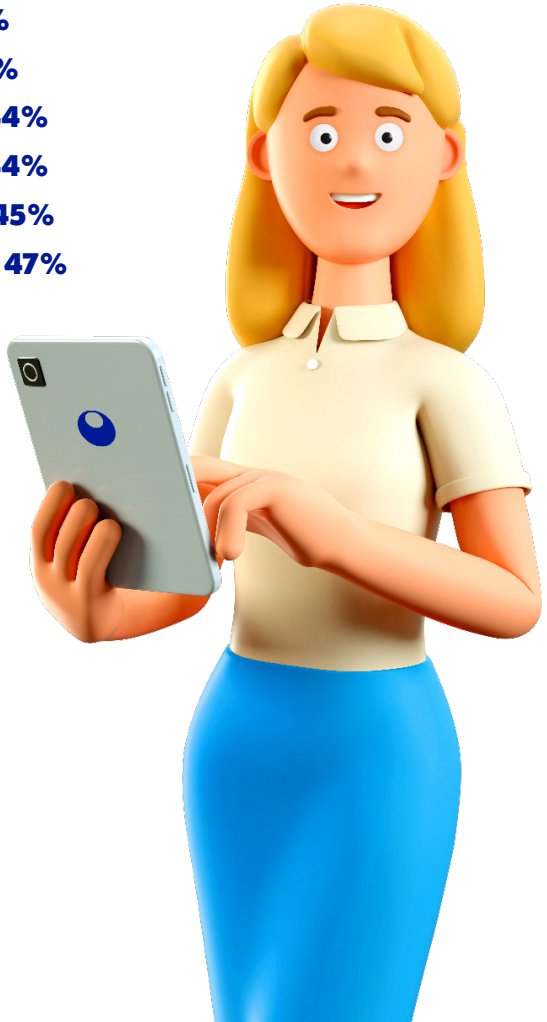
A significant proportion of private renters (34%) found it difficult to afford their energy bills in August 2025, which is a slight decrease from 39% in 2024. For certain tenant groups this figure was significantly higher, such as those aged between 45-59, those living with a mental/physical health condition, those on low income, and tenants in receipt of benefits.

In August 2025, how easy or difficult was it for you to afford the energy/utility bills?



% who found it difficult to afford utility bills





HOUSING ASPIRATIONS AND EXPECTATIONS

Tenants' aspiration for home ownership has increased since last year, rising from 70% to 76%. However, there seems to be a gap between housing aspiration and expectations among private renters; only 49% are confident they won't be lifelong renters. Around one in five (22%) renters would prefer to live in social housing, this is slightly lower than last year (24%).

I would like to own my own home



I'm likely to rent a property for the rest of my life



I would prefer to live in social housing

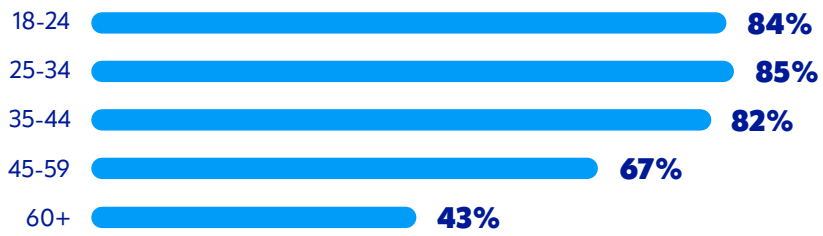


Strongly Agree | Somewhat Agree | Neither Agree nor Disagree | Somewhat Disagree | Strongly Disagree

Housing aspirations vary significantly across different age groups. Older renters are more likely to consider their rental property as a long-term home, whereas younger renters may consider renting as a temporary situation.

Notably, since last year, there has been a 14% increase in tenants aged 18-24 expressing a desire to buy their own home. As of October 2025, there was an 8.8% annual increase in mortgages to first-time buyers[7]. This may imply that more younger people are purchasing homes, since first-time buyers tend to be younger on average.

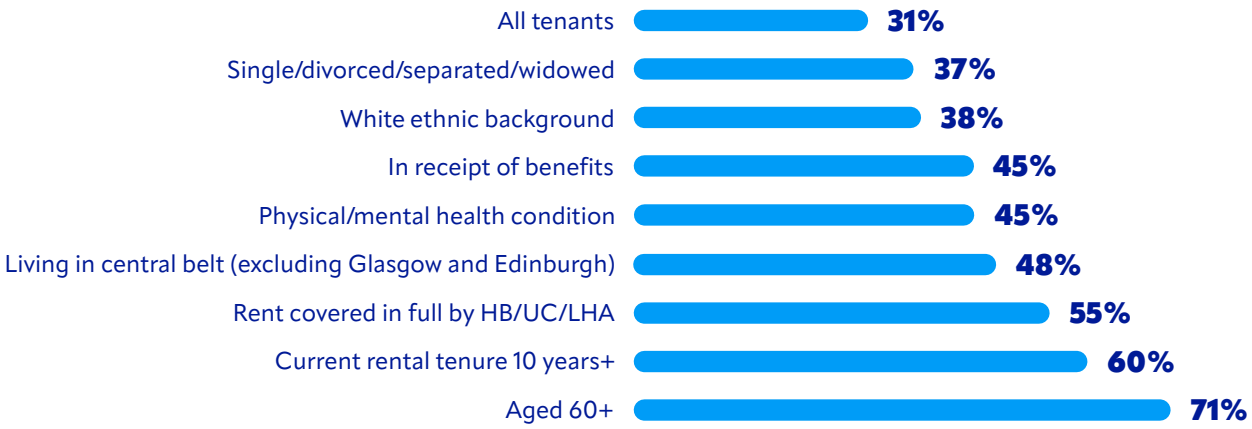
Would like to buy their own home, by age



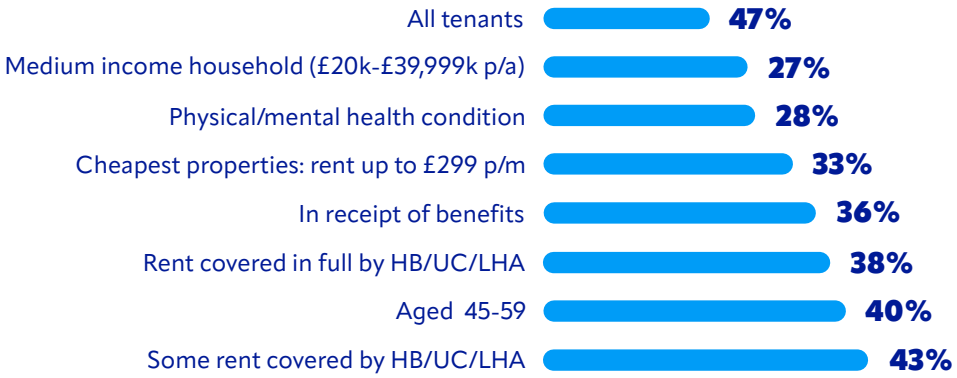
7 Scottish Government, (October 2025), Scottish Housing Market Review Q3 2025

Different tenant groups have varying expectations and preferences when it comes to their housing options. Over half of some groups, including older tenants, those who have lived in their rental property for over ten years and those in receipt of benefits are more likely to believe they will be lifelong renters.

I'm likely to rent a property for the rest of my life



I would prefer to live in social housing



Unsurprisingly, groups of tenants that face greater affordability challenges are more likely to prefer social housing, such as tenants receiving benefits, those renting the cheapest properties, and those living with a physical or mental health condition.

Notably, four in ten middle-aged renters would prefer to live in social housing, this group was also found to be struggling to meet monthly rental costs and utility bills. Research has shown that middle-aged renters increasingly face challenges once associated with younger renters, including high rents and poor-quality housing, with limited savings and age-related barriers leaving many discouraged about their housing prospects[8].

8 UK Collaborative Centre for Housing Evidence, (2019), Beyond Generation Rent: Understanding the aspirations of private renters aged 35-54

CHAPTER THREE

Security of tenure

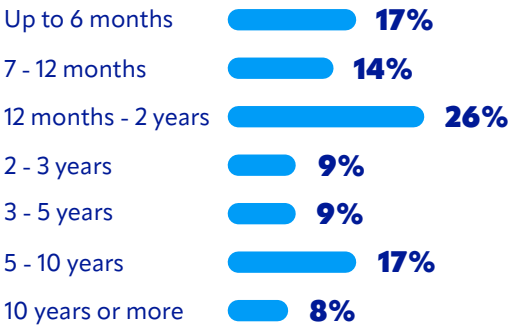
SUMMARY

Tenants' preferences and experiences regarding tenancy length and of renting in general are highly varied. People often move home in response to changing needs, and many report feeling secure and having positive relationships with their landlord or letting agent. Nevertheless, almost half of tenants (47%) would like to move but feel unable to do so, and about 43% have relocated in the past 12 months because of problems or disadvantages associated with their rental property.

TENANCY LENGTH

Most tenants have lived in their current rental accommodation for relatively short periods, with nearly one third (31%) having moved into their property in the last 12 months (up from 27% in 2024). However, longer tenancies are not uncommon, with a quarter of tenants having lived in their property for more than five years, and 8% for more than ten years. These findings are similar to last year.

Length of current tenure: September 2025



PLANNED RENTAL TENURE

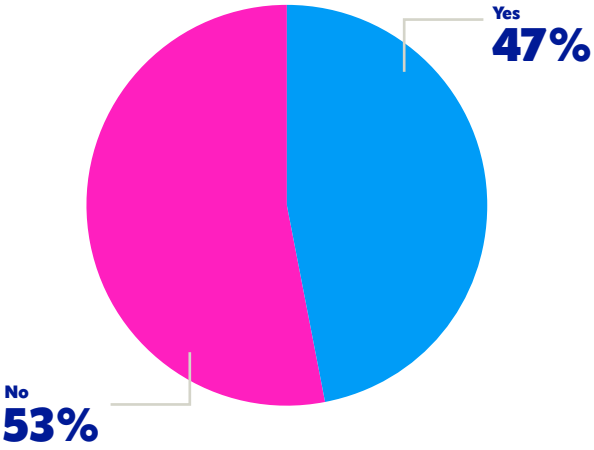
The survey asked tenants how long they planned to stay in their current tenancy. Over half of private renters (55%) plan to be in their current private rented property for at least another year. Tenants aged 60 or over and those in receipt of benefits are more likely to want to remain in their property for five years or more compared to other tenant groups.

Planned rental tenure



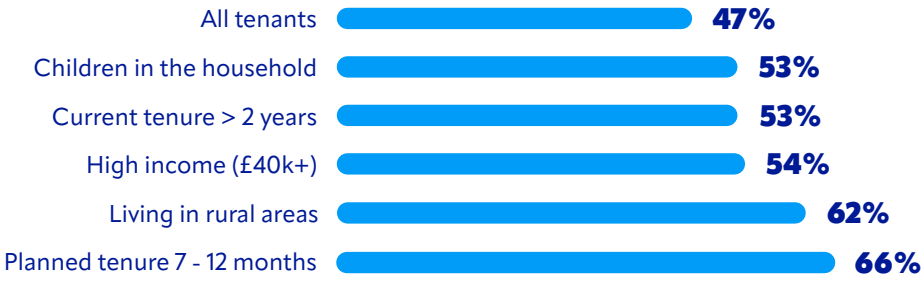
The survey asked tenants whether they would like to move from their current home but feel unable to; many tenants (47%) agreed that they would prefer to move, which is similar to last year (45%).

Would you like to move from current rental property but feel unable to



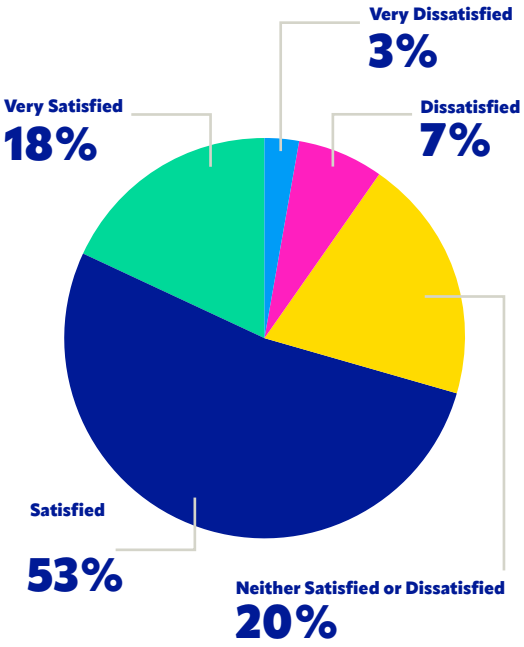
Some tenant groups were more likely to say they would like to move.

% of tenants who would like to move but feel unable to

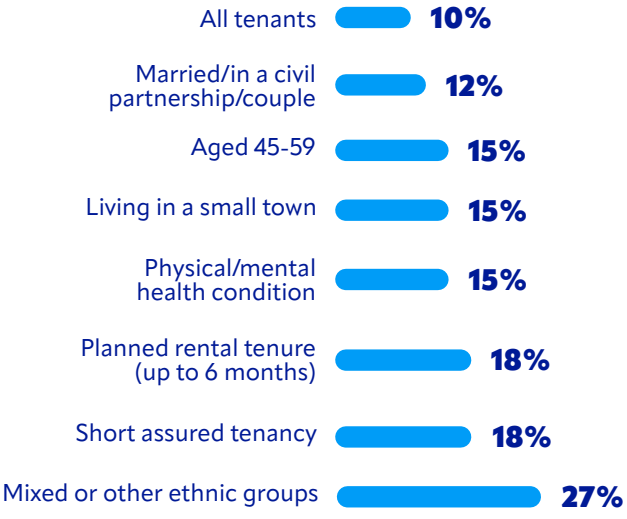


Participants were asked to rate their overall satisfaction as a tenant. The majority (71%) of private renters report being satisfied, which is identical to last year. Levels of dissatisfaction have fallen from 12% to 10%. These figures do not reflect the proportion of tenants who indicated they would like to move from their current property (as noted above), suggesting that satisfaction may involve different factors.

Overall satisfaction as a tenant



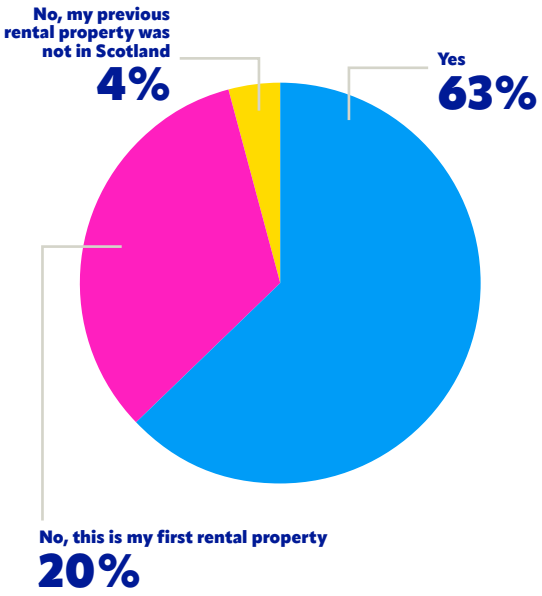
% of tenants who are dissatisfied



REASONS FOR MOVING

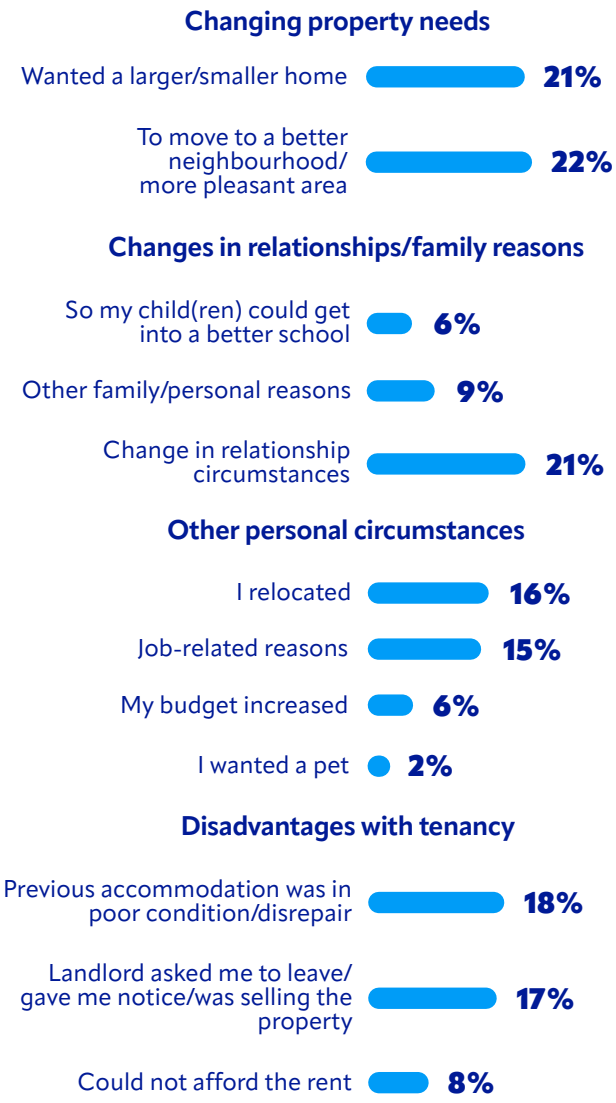
Many tenants (63%) have previously moved from a rental property within Scotland, however one-third stated that their current home was the first property they had ever rented. This may be reflective of the large proportion of young people who live in the sector.

Previously moved from a rental property in Scotland



The survey asked about the reasons why tenants moved from their last property. Nearly half of private tenants (47%) have relocated for job reasons, to access better schools, or to move to a better area, similar to last year (49%). Over a third of private tenants (36%) moved for property-related needs (e.g., space or due to poor conditions), up from 31% last year. Just over one fifth of private tenants moved due to relationship changes or family reasons.

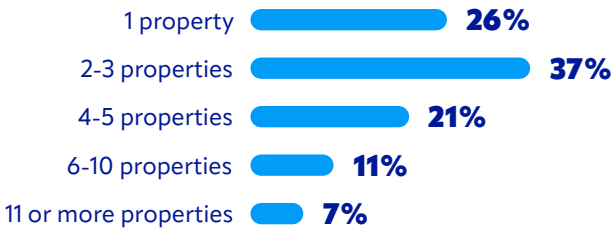
Top reasons for moving



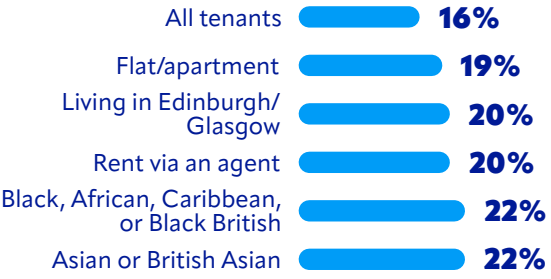
NUMBER OF PROPERTIES VIEWED

Compared to last year, tenants are viewing a similar number of rental properties. The majority (63%) viewed one to three properties when searching for their last rental accommodation. Over one in ten (12%) of those from Asian/British Asian backgrounds viewed 11 or more properties, and 17% of those from Black, African, Caribbean or Black British backgrounds viewed six to ten properties before finding a suitable rental property, indicating these groups of tenants face greater barriers in securing a suitable property.

Number of properties viewed



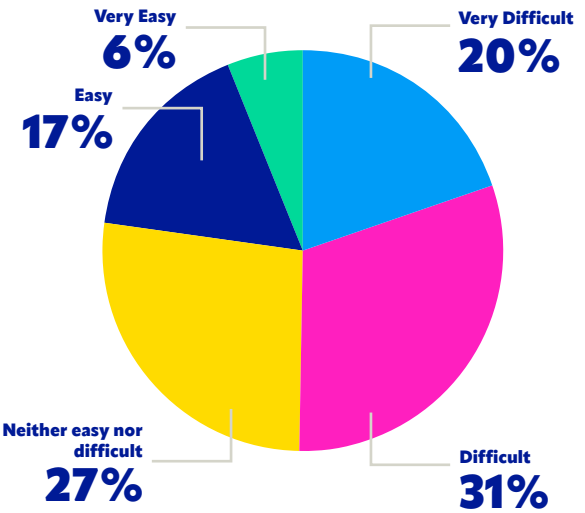
Viewed 6 or more properties



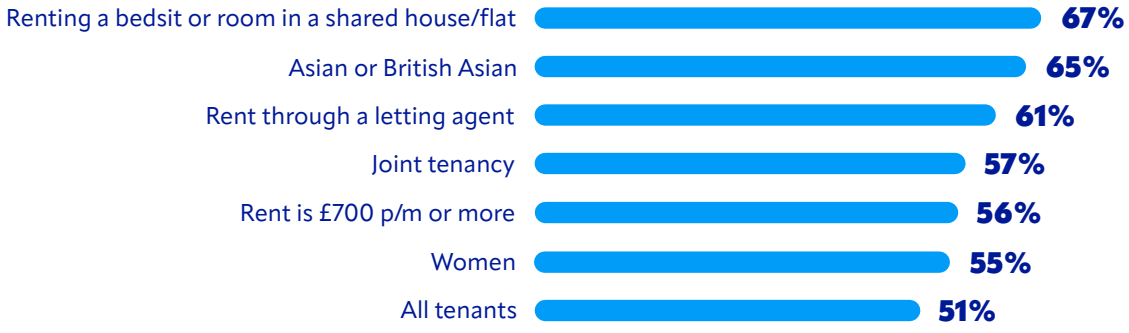
EASE OF FINDING A NEW PROPERTY

Over half (51%) of private tenants find it difficult to find a rental property (vs. 59% in 2024), particularly for those who rent via a letting agent (78%). Certain groups are more likely to report difficulty in their property search, such as women, those who are Asian or British Asian, those who are renting a bedsit or room in a shared house.

How easy or difficult was it to find a suitable property?



% of tenants who found it difficult to find a suitable property



CHALLENGES WHEN SEARCHING FOR A PROPERTY

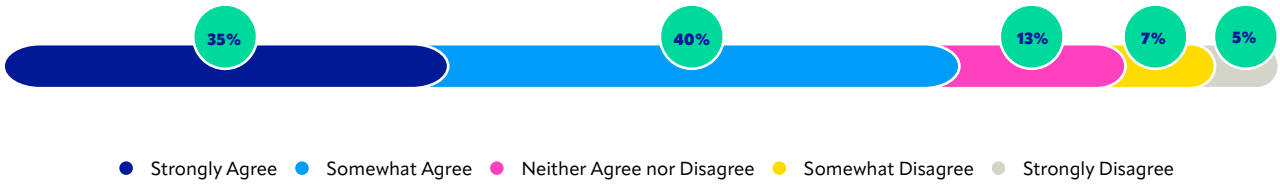
A significant proportion (73%) of private tenants face challenges when searching for a property. This has remained fairly constant since 2024 when 72% reported challenges. Two in five (40%) of all tenants, and nearly half of those who had moved in the past 12 months, reported finding an affordable property as the most challenging aspect of looking for rental accommodation.

CHALLENGES DURING LAST PROPERTY SEARCH	
Difficulty finding an affordable property	40%
Difficulty in affording a deposit	20%
Landlord/letting agent requested rent in advance	15%
Difficulty finding a landlord/letting agent who would allow pets	14%
Had to move to a new area due to lack of affordable properties	13%
Difficulty finding accessible and inclusive housing	12%
Difficulty in getting a UK-based guarantor	9%
Having to accept a property that was smaller than I needed or of poor quality, to stay near my children's school	8%
Landlord/letting agent didn't want to let to tenants on benefits	7%
Landlord/letting agent unwilling to let to me due to my race, gender or other personal characteristics	6%
Universal Credit/Housing Benefit/Local Housing Allowance would not cover the cost of the property	6%
Landlord/letting agent didn't want to let to tenants with children	5%

FEELINGS OF SECURITY

Most tenants feel secure in their home (76%), however 12% of tenants report feeling insecure. The Housing (Scotland) Act, passed by the Scottish Parliament in September 2025, introduces significant reform aimed at increasing tenant security, through improved property standards and rights, greater eviction protections and homelessness prevention measures.

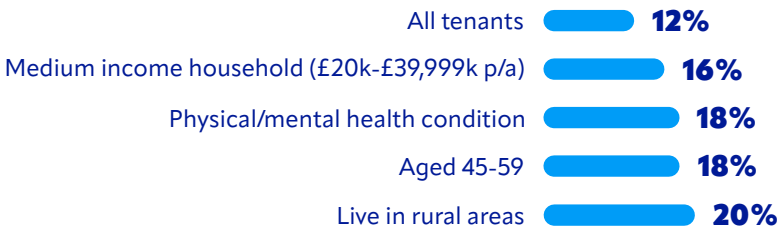
I feel secure in my home



One in five tenants who live in rural areas do not feel secure in their home.

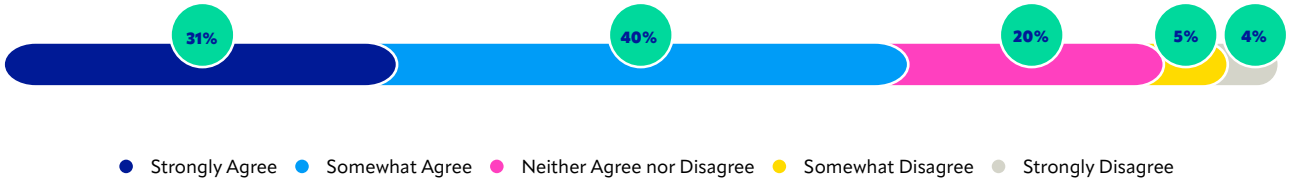
Recent research has indicated that there is an emerging trend in Scotland's rural areas where housing stock previously used for long-term housing is increasingly being repurposed as short-term holiday rentals[9]. Only one in ten islanders agree that there is enough housing to meet local demand[10].

% of tenants who don't feel secure in their home



Most tenants (71%) report a good relationship with their landlord or letting agent, with only 8% of tenants reporting that they don't have a good relationship.

I have a good relationship with my landlord



9 Scottish Government, (September 2025), Understanding the changing nature and context of poverty in Scottish rural and island communities since 2010
10 Scottish Government, (2024), Scottish Islands Survey 2023: main findings report

CHAPTER FOUR

Property conditions

SUMMARY

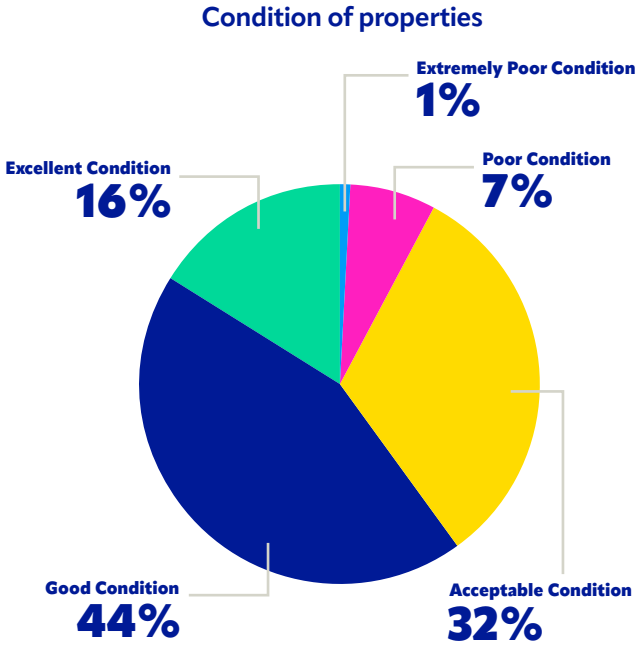
Most tenants rate the condition of their property as good or acceptable, with seven per cent rating it as poor. While over half of tenants experienced a problem with the quality of their rented property in the last six months, nine in ten tenants reported the issue to their landlord or letting agent and the problem was then either fully or partially addressed. For the minority of tenants who did not have their problem addressed, very few escalated complaints to their local council or the First-tier Tribunal.

CONDITION OF PROPERTIES

Most tenants (61%) rate the overall condition of their property as good or excellent condition, with only 7% of tenants rating their property as being in poor condition.

Over half (58%) of tenants experienced an issue with the condition or quality of their property in the last six months, down from 61% in 2024.

Certain tenant groups are more likely to have experienced at least one issue, including: younger tenants, those in receipt of benefits, and those who have lived in their rental property between 12 months and two years.



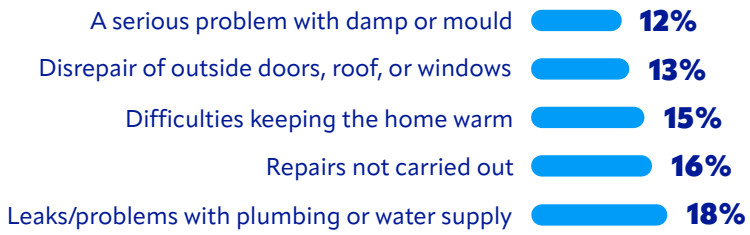
The findings show that the condition of the property is a key factor affecting satisfaction rates among tenants.

		OVERALL TENANT SATISFACTION				
		Very dissatisfied	Dissatisfied	Neither satisfied or dissatisfied	Satisfied	Very satisfied
CONDITION OF PROPERTY	Extremely poor condition	4%	2%	1%	0%	1%
	Poor condition	28%	32%	10%	3%	1%
	Acceptable condition	31%	37%	57%	30%	10%
	Good condition	8%	27%	27%	56%	38%
	Excellent	29%	2%	5%	11%	50%

HOUSING MAINTENANCE

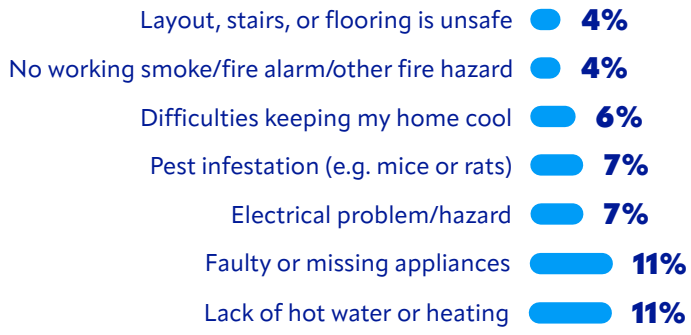
Among those reporting housing maintenance related issues in the past six months (58%), the most common problems relate to plumbing or water supply, repairs not being carried out, and difficulties keeping the home warm. Around one in ten tenants report a serious problem with damp or mould.

Top 5 problems in the last 6 months



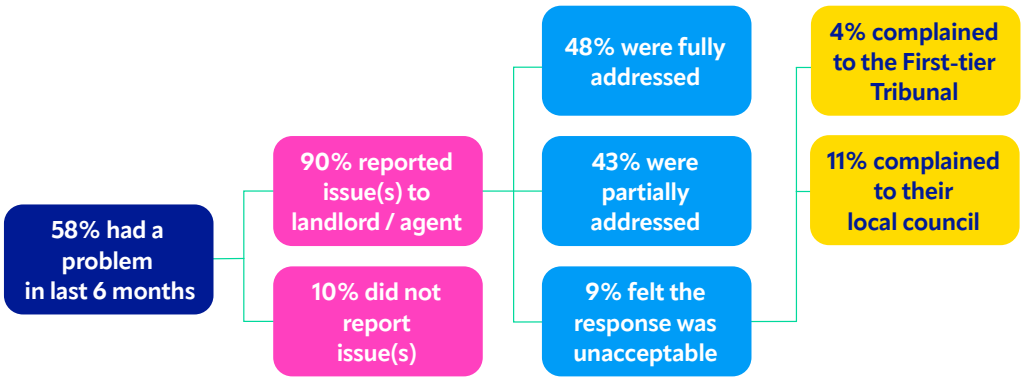
Less common issues reported by tenants include unsafe layout or flooring, difficulties keeping the home cool, and pest infestations.

Other problems reported by tenants



REPORTING ISSUES

Encouragingly, compared to last year, tenants reporting problems are more likely to have them fully addressed. A significant majority of tenants (90%) report the problems outlined above to their landlord or letting agent, and in most cases (91%) the issue is fully or partly addressed, up from 85% in 2024. However, when issues remain unaddressed, only a small minority of tenants escalate their complaint to their local council or the First-tier Tribunal.



The survey explored the reasons that might prevent tenants from reporting their issues and escalating problems. Over a third (34%) of tenants felt like the problem didn't seem serious enough, and a quarter did not think anything would be done about it.

As in 2024, nearly a quarter of tenants remain worried about retaliatory eviction, despite the abolition of 'no faults' evictions in Scotland.

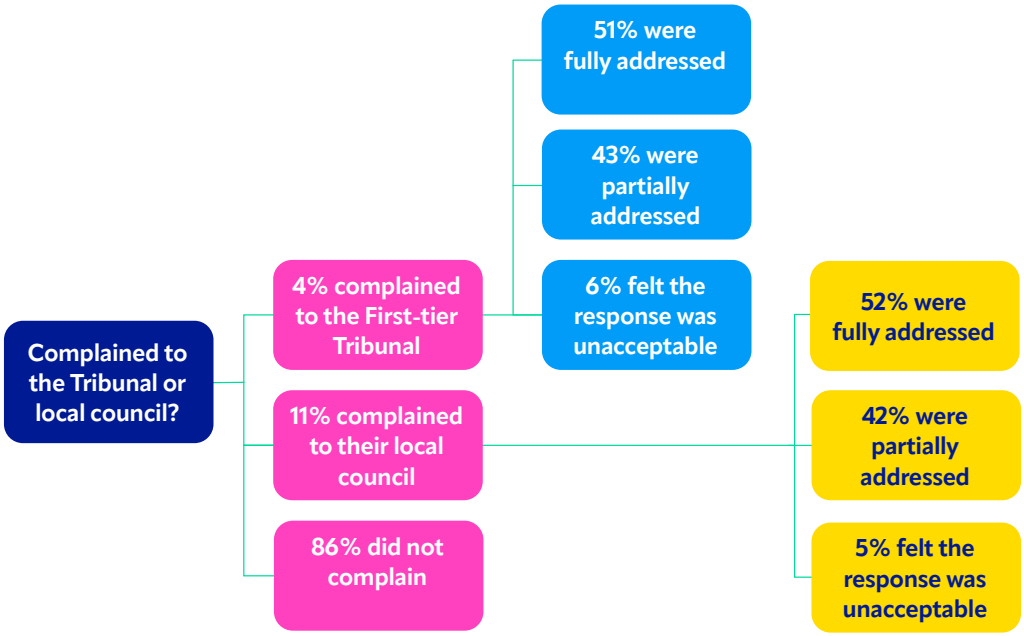
REASONS FOR NOT REPORTING THE ISSUE(S) TO LANDLORD OR LETTING AGENT	
Problem didn't seem serious/urgent enough	34%
I want to be seen as a "good tenant"	26%
Didn't think anything would be done about it	25%
I am worried the landlord might ask me to leave	24%
Too much hassle	22%
I am worried the landlord might increase the rent	22%
I decided to fix the problem myself	21%
I am worried about finding another suitable rental property	17%
I have a good relationship with my landlord; I don't want to bother them	16%

SEEKING REDRESS

The survey asked tenants who had escalated their complaints whether they were satisfied with the response they received. Among those who took their complaint to their local council, 94% reported that the issue has been fully or partially addressed, with only 5% reporting the response was inadequate. This shows an improvement since last year, when 23% felt the response was inadequate.

Fewer tenants took their complaints to the Tribunal compared to their local council. However, of those who did, 94% were happy with the response.

Overall, the findings indicate Scotland's PRS redress system is effective and generally regarded positively by tenants when they do engage with it.



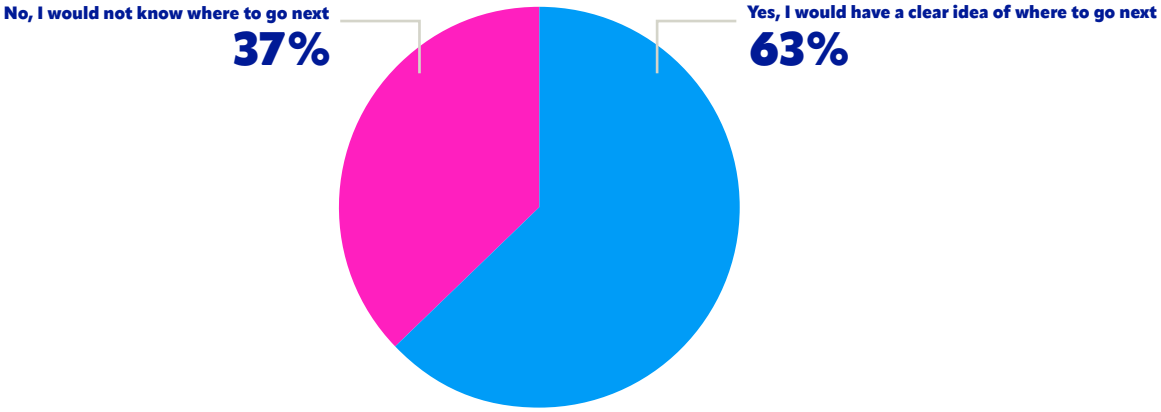
Barriers to filing a complaint to local councils or the Tribunal are similar to the reasons tenants do not report issues to landlords or letting agents.

REASONS FOR NOT REPORTING THE ISSUE(S) TO LOCAL COUNCIL OR FIRST-TIER TRIBUNAL FOR SCOTLAND	
Problem didn't seem serious/urgent enough	24%
Am still hoping to resolve with the landlord	17%
I want to be seen as a "good" tenant	17%
Too much hassle	17%
I didn't know they existed	16%
I decided to fix the problem myself	15%
I am worried the landlord might increase the rent	15%
I am worried the landlord might ask me to leave	14%
Didn't think anything would be done about it	14%
Works are still being carried out/are planned	14%
I'm worried about finding another suitable rental property	14%
I didn't understand how they could help	12%

Notably, 27% were either unaware of these redress mechanisms or lacked understanding of their role and function.

Thirty-seven percent of tenants said they would not know where to turn if they had a housing problem that their landlord or letting agent failed to address, further highlighting a lack of awareness of available redress mechanisms. However, the proportion of tenants who have a clear idea of where to seek help next has increased significantly, rising from 55% in 2024 to 63% in 2025.

If you had a problem with your rented home that your landlord/letting agent failed to address, would you know where to take your complaint next?



AWARENESS OF KEY DOCUMENTATION

By law, landlords must provide either the 'Easy read notes for the Scottish Government model tenancy agreement' or the 'Private Residential Tenancy Statutory Terms Supporting Notes' to tenants, depending on the type of tenancy. However, only 44% of tenants recalled receiving either of these documents.

Landlords must also provide tenants with several other documents and certificates. While most tenants said they had been provided with a tenancy agreement (88%), only approximately half recall receiving the energy performance certificate, the deposit protection certificate or prescribed information. Tenants renting via a letting agent were more likely to claim receipt of the required documentation.

It is important to highlight that these figures are more likely to reflect tenants' awareness of these documents rather than how often they are issued.

% WHO CLAIM, YES, I HAVE BEEN GIVEN/SENT THIS DOCUMENT			
	All tenants	**Renting via agent**	**Renting direct from landlord**
Either 'Easy Read Notes for the Scottish Government Model Private Residential Tenancy Agreement' or 'Private Residential Statutory terms Supporting Notes'	44%	45%	43%
Gas safety certificate	59%	62%	57%
Energy performance certificate	53%	56%	50%
Deposit protection certificate	53%	65%	42%
Prescribed information about how to reclaim your deposit	50%	55%	45%
Tenancy agreement	88%	94%	82%

CHAPTER FIVE

Experiences of different groups of tenants

SUMMARY

To understand the experiences and preferences of people in the private rented sector, it is important to take into account the variety of tenants and their living situations. The survey found that experiences vary according to several key factors, including ethnicity, age, location, health status, and gender.

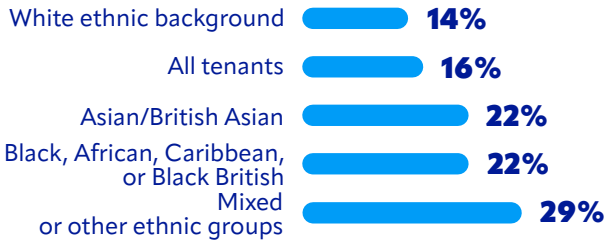
ETHNICITY

In the survey, respondents were asked to select their ethnic background from a list, which for the purposes of the report were grouped into white; Asian or British Asian[11]; Black, African, Caribbean, or Black British; and mixed and other ethnic backgrounds[12].

The findings show that 28% of tenants in Scotland are from a minority ethnic background. These tenants are more likely to face challenges around some aspects of affordability, searching for a property, and level of satisfaction.

- Tenants from minority ethnic backgrounds face higher monthly rental costs, averaging £924, compared to £870 for all tenants.
- Certain ethnic minority groups are more likely to face rent affordability challenges. Among Asian/British Asian tenants, 20% struggle to pay rent compared to 10% of all tenants.
- Tenants from ethnic minority groups are more likely to face difficulties when searching for a property. During their last property search, 22% of tenants from minority ethnic backgrounds viewed six or more properties, compared to 14% of tenants from a white background.

% of tenants who viewed more than 6 properties



- Compared to 51% of all tenants, 65% of Asian or British Asian tenants found it difficult to find a suitable property.
- Mixed or ethnic backgrounds are more likely to report being dissatisfied as renters (27%) compared to 10% of all tenants.
- Tenants from ethnic minority backgrounds were more likely to face challenges during their last property search, at 82%, compared to tenants from a white background at 68%. More specifically, they were more likely to struggle to secure a UK based guarantor, face discrimination and have to accept a property smaller than needed.

11 Including Indian, Pakistani, Bangladeshi, Chinese, and any other Asian background

12 Including white and black Caribbean, white and black African, white and Asian, any other mixed/multiple ethnic background, Arab, Gypsy or Irish Traveller, and any other ethnic group

CHALLENGES FACED DURING LAST PROPERTY SEARCH				
	White background	Asian or British Asian	Black, African, Caribbean or Black British	Mixed or other ethnic groups
Any challenge	68%	83%	80%	100%
Difficulty finding an affordable property	39%	42%	46%	39%
Difficulty in affording a deposit	20%	24%	18%	26%
Difficulty in getting a UK based guarantor	7%	16%	11%	23%
Having to accept a property that was smaller than I needed	6%	16%	11%	23%
Landlord/letting agent unwilling to let to me due to my race, gender or other personal characteristics	3%	11%	12%	7%

TENANTS RECEIVING BENEFITS

The proportion of private renters who receive benefits to help pay their rent has risen from 17% in 2024, to nearly a quarter (24%) of all tenants in 2025. This may reflect the cost-of-living crisis and the continued lack of social housing. Tenants in receipt of benefits are significantly more likely to struggle with issues related to affordability, insecurity, and poor property conditions:

- 80% of tenants receiving benefits face challenges when searching for a rental property (compared to 73% among all tenants), with one-fifth reporting the landlord/letting agent didn't want to let to tenants receiving benefits.
- Nearly half (45%) believe they are likely to rent a property for the rest of their life and 36% would rather live in social housing (compared to 31% and 22% among all tenants, respectively).
- Over half (56%) are cutting back on essentials to pay rent compared to 47% of all tenants.
- 44% find it difficult to afford energy bills compared to 34% of tenants who do not receive benefits.
- Over one in ten (11%) live in properties that are in poor condition, compared to 7% of tenants who do not receive benefits.

OLDER AND YOUNGER RENTERS

Older renters can be considered as those aged 60 or above, and younger renters as those aged 18-34.

- Older renters enjoy cheaper average rental costs than younger tenant groups.
- Seventy percent of older renters are more likely to have lived in their rental property for two years or more compared to 28% of younger renters (aged 18-34 years).
- Less than half (43%) of older private renters would like to own their home compared to 84% of younger renters.
- Forty-one percent of older renters found their property search easy compared to 17% of younger renters (aged 18-34 years), and 44% of older renters viewed only one property during their search for accommodation, compared to 20% of younger tenants.

AGE GROUP	AVERAGE RENTAL COST
18-24	£867
25-34	£893
35-44	£870
45-59	£910
60 and over	£740

- Younger private renters disproportionally experience affordability challenges. Over a third (35%) of younger private renters (18-34 years) find it difficult to find a property, with nearly half (46%) of this group reporting their main challenges as finding affordable property.

- Rent arrears are more prevalent among younger age groups. Sixteen percent of those aged 18-34 are in rent arrears compared to only 6% of those aged 60 or over.

TENANTS WITH A LONG-TERM PHYSICAL OR MENTAL HEALTH CONDITION

Thirty-one percent of private renters in Scotland are living with a long-term physical or mental health condition. The findings highlight specific challenges faced by this group of tenants:

- Forty-four percent of tenants where a household member requires home adaptations have moved in the last 12 months, compared to 31% of all tenants.

- Over a quarter of tenants (26%) with a long-term physical or mental health condition find it very difficult to find a rental property.

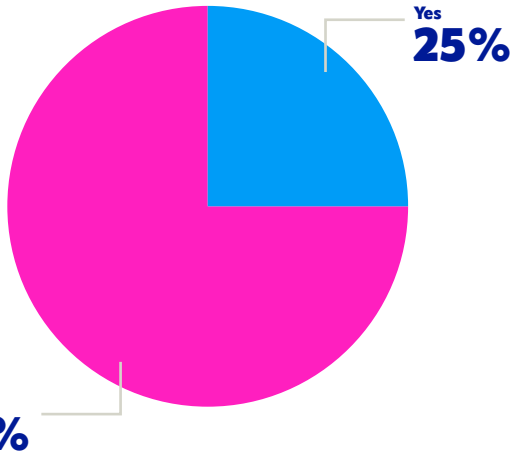
- A significant proportion (19%) of tenants with long-term physical or mental health conditions, and 29% of those where a household member requires home adaptations, report difficulties finding a landlord/letting agent that would allow pets (compared to 14% among all tenants).

- A higher proportion of this group rate the quality or condition of their property as 'poor', at 14%, compared with all tenants at 7%.

Home adaptions

The survey asked tenants with long-term physical or mental health conditions whether they required home adaptations to make the rented property more inclusive and accessible. A quarter of tenants (25%) said they did require adaptations.

Requires Home Adaptations



Only half of tenants (50%) requiring home adaptations asked their landlord to make these changes. Research has suggested that uncertainty about financial and health-related eligibility is a common barrier to people accessing home adaptations.[13]

WOMEN

Women represent over half of the tenants (56%) in Scotland's private rented sector and are significantly more likely to struggle with issues related to housing security and affordability:

- Over a third (35%) of women have moved in the last 12 months.

- Over half (55%) of women have reported difficulty in finding a property, compared to 46% of men, and 50% of all tenants.

- Forty-five percent of women report affordability as a challenge when searching for a rental property, compared to 40% among all tenants.

- Nearly a third (32%) of women struggle with rental costs, compared to 23% of men, and 28% of all tenants.

- Over half (53%) of women cut day-to-day spending to pay their rent, compared to 39% of men, and 47% of all tenants.

13 Centre for Ageing Better, (July 2018) A Personal and Professional Perspective on Home Adaptions

TENANTS LIVING IN EDINBURGH AND GLASGOW

Over half (58%) of tenants live in Scotland's largest cities, Edinburgh and Glasgow, and are more likely to face challenges related to affordability in the private rented sector[14].

	AVERAGE MONTHLY RENT
Living in Edinburgh & Glasgow	£966
All tenants	£870

- Over a third of tenants (34%) living in Glasgow and Edinburgh find it difficult to afford their rent, and around one in ten tenants in this group (11%) moved from their last rental property as they could no longer afford the rent.
- Forty-five percent had a rent increase in the last 12 months, compared to 40% of all tenants.
- Over half (51%) have cut day-to-day spending to pay their rent, compared to 47% of all tenants.
- Forty percent are struggling to afford energy bills, compared to 34% of all tenants.

14 For the purposes of the report, Edinburgh and Glasgow include the following areas: City of Edinburgh; East Dunbartonshire; East Lothian; East Renfrewshire; Glasgow City; Midlothian; North Lanarkshire; Renfrewshire; South Lanarkshire; West Lothian; West Dunbartonshire.

CHAPTER SIX

Attitudes towards energy efficiency in the private rented sector

SUMMARY

One in three tenants struggle to afford their energy bills and nearly half (45%) reported that the energy efficiency of their property could be improved. Most tenants consider energy efficiency an important factor when deciding whether to rent a property. Despite this, only one in five tenants have either applied for financial government support or been offered support, and most tenants (63%) had not asked for their landlord or letting agent to improve the energy efficiency of the property.

IMPORTANCE OF ENERGY EFFICIENCY

When choosing a rental property, most tenants (88%) consider energy efficiency as an important factor in their decision making. This is particularly important to younger renters, those who are Black, African, Caribbean, or Black British, and those who are married/live together as a couple.

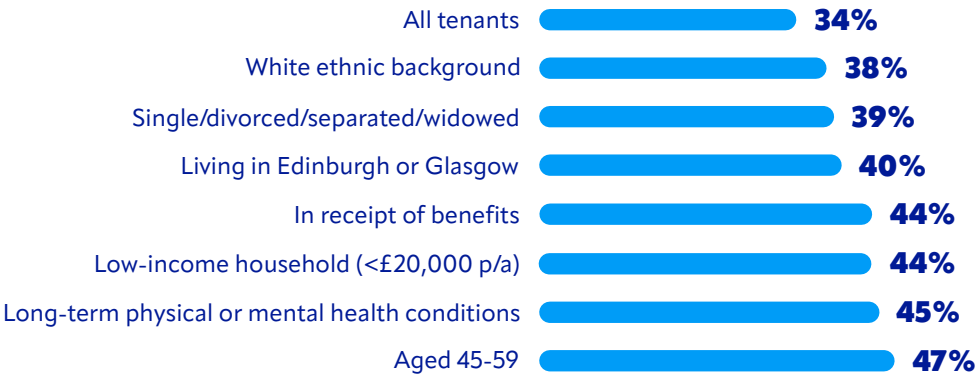
Importance of energy efficiency when choosing a rental property



ENERGY AFFORDABILITY

In August 2025, over one in three tenants (34%) of tenants found it difficult to afford energy bills. Certain groups are more likely to struggle for instance; middle-aged renters; and those living with long-term physical or mental health conditions.

% of tenants who found it difficult to afford energy bills

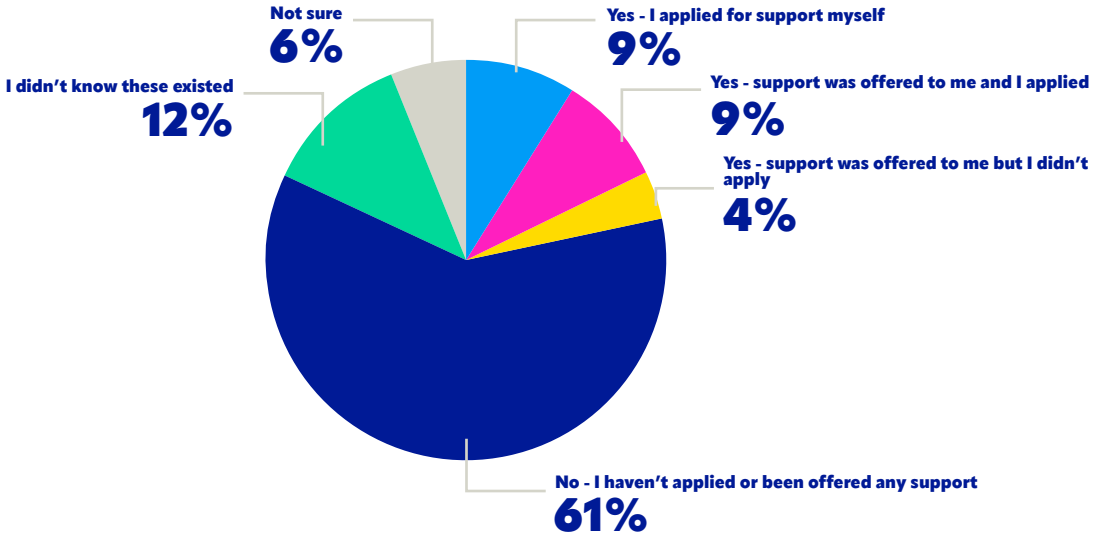


FINANCIAL SUPPORT FOR ENERGY BILLS

The survey asked if participants have ever applied or been offered any financial support (such as grants or government funding) to help with their energy bills or to make their home more energy efficient.

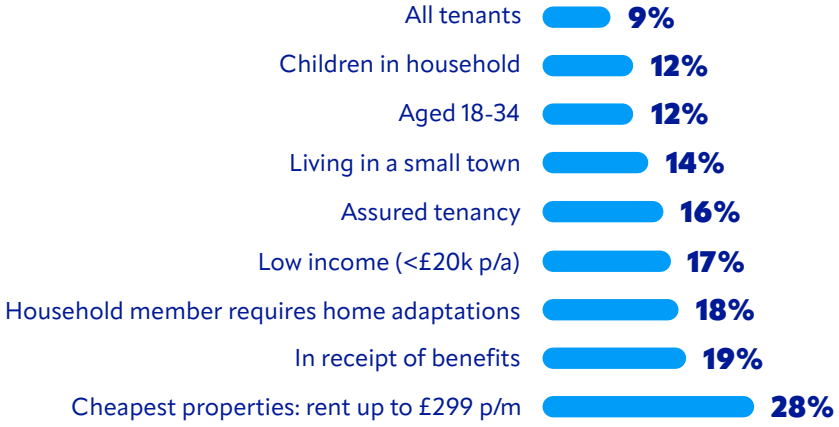
Only 18% of tenants have applied for support, while a further 4% were offered support but chose not to apply.

Have you ever applied for or been offered any financial support to help with your energy bills or to make your home more energy efficient?

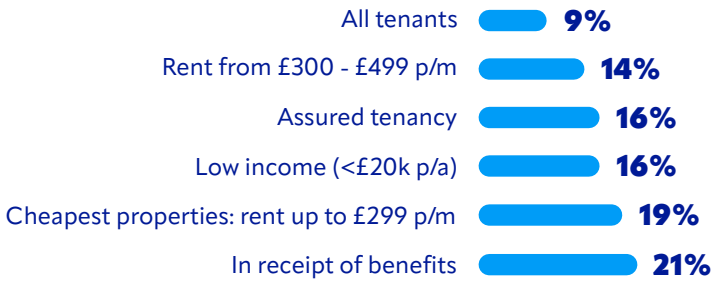


Tenants who were more likely to apply for support include those paying the cheapest rent, those in receipt of benefits, and those living on low income.

% of tenants who applied for support themselves



% of tenants who were offered support and applied



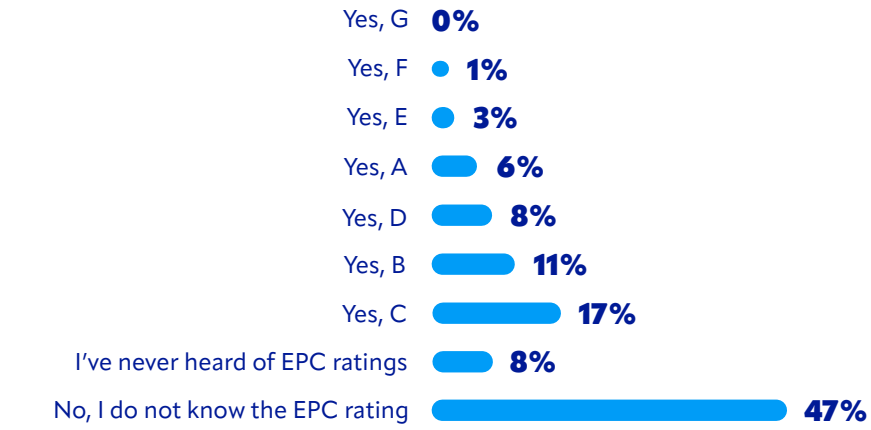
EPC RATINGS

The survey asked participants if they know the EPC rating of their rented property. Nearly half (47%) of tenants do not know the EPC rating of their rental property and an additional 8% have never heard of EPC ratings.

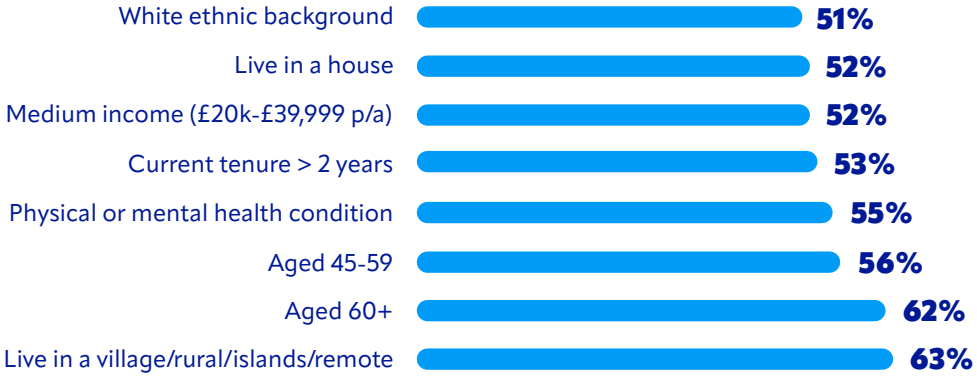
This aligns with the earlier finding that only 53% of tenants recall being given/sent the energy performance certificate for their property.

Tenants more likely to be unaware of the EPC rating of their rental property include: those who are over 45 years old; those from a white ethnic background; those who live rural/remote; and those with a physical or mental health condition.

Do you know EPC rating of rented property?



% of tenants who do not know the EPC rating of their rental property

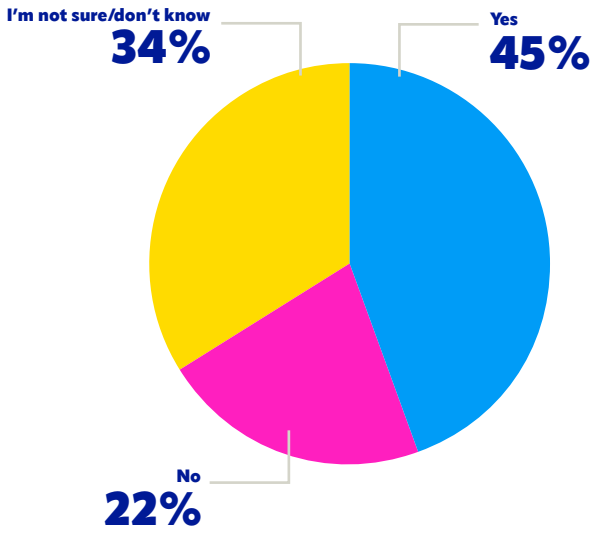


POTENTIAL FOR ENERGY EFFICIENCY

Tenants were asked if, in their opinion, the landlord/letting agent could improve the energy efficiency of their current rental property.

Nearly half (45%) reported that the energy efficiency of their property could be improved.

Could the landlord/letting agent improve the energy efficiency of your current rental property?



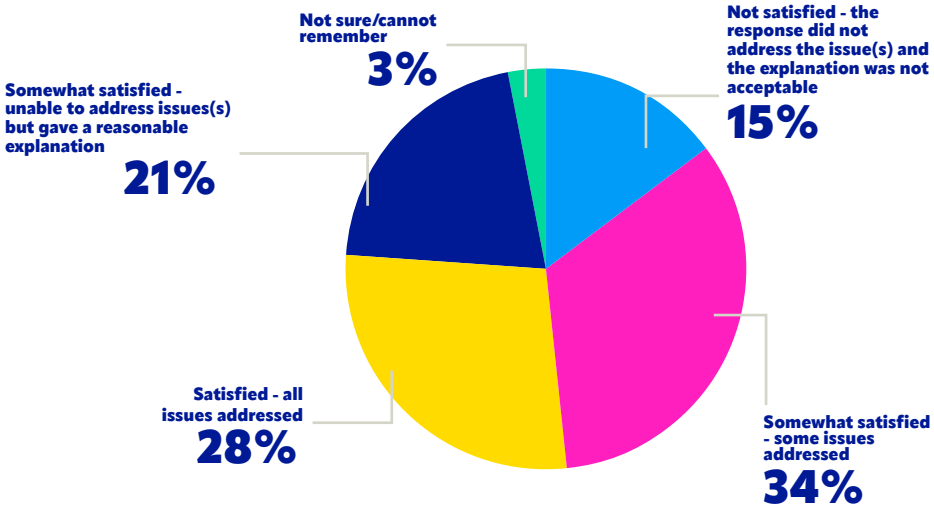
REQUEST FOR ENERGY IMPROVEMENTS

Tenants were asked if they had asked their landlord or letting agent to improve the energy efficiency of their rented property.

Most tenants (63%) had not asked their landlord or letting agent to improve the energy efficiency of their rental property, with only 37% requesting energy efficiency improvements.

Of those tenants who made a request to their landlord or letting agent, most were satisfied with the response (82%), with 15% dissatisfied with the response.

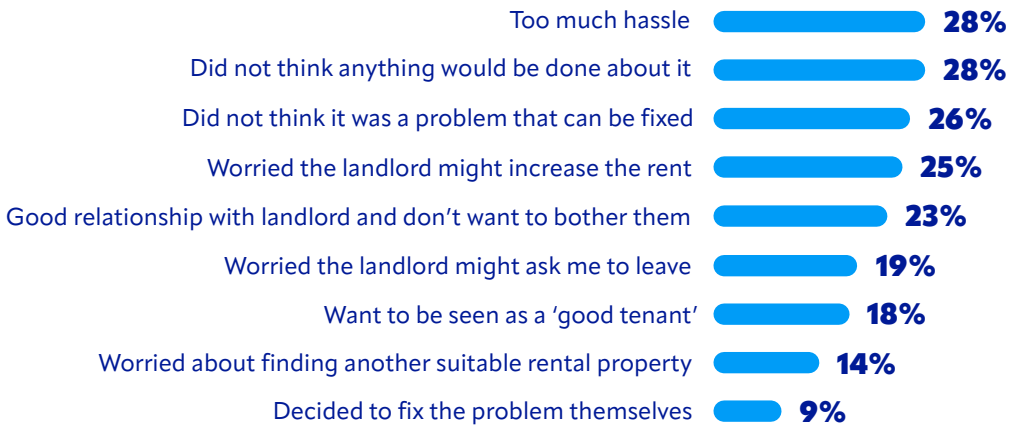
How satisfied were you with the response from your landlord/letting agent following requests for energy efficiency improvements?



Tenants who did not raise the energy efficiency issue were asked to provide reason(s) why.

Over half of tenants (57%) reported they were worried about potential repercussions of making a request, such as the landlord increasing their rent or causing too much hassle and upsetting the relationship with their landlord.

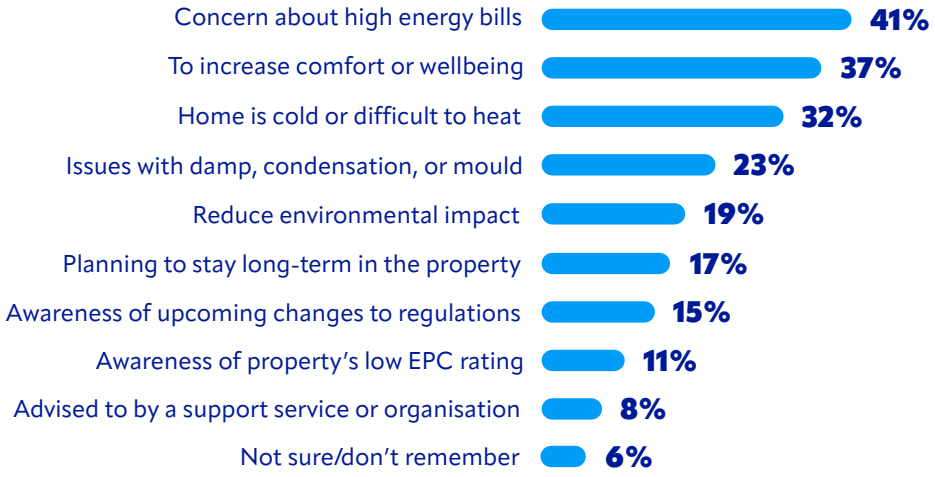
Reasons for not raising energy efficiency issues



Tenants who did request energy efficiency improvements to their landlord or letting agent were also asked to provide reasons why.

The most common reasons relate to energy costs and health. Two in five (41%) tenants were concerned about high energy bills, and 37% of tenants believed that improvements could increase their comfort or wellbeing.

Reasons for raising the energy efficiency issue

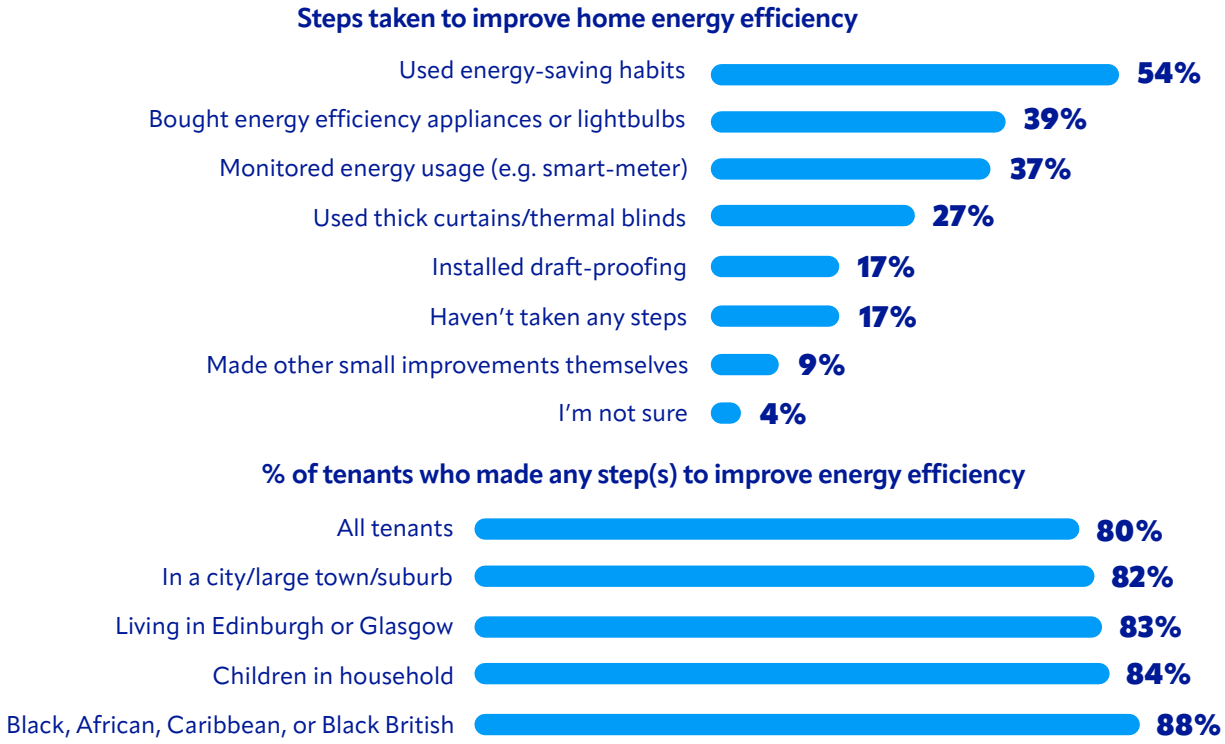


STEPS TAKEN TO IMPROVE ENERGY EFFICIENCY

Tenants were asked if they had taken any steps to improve the energy efficiency of their home.

Most tenants (80%) had taken at least one step. Over half (54%) of tenants report practicing energy-saving habits within their home, such as turning off lights, having shorter showers, lowering the thermostat.

Other energy saving steps commonly reported by tenants were buying energy-efficient appliances or lightbulbs (54%) and monitoring their energy usage (37%), for example through a smart-meter.

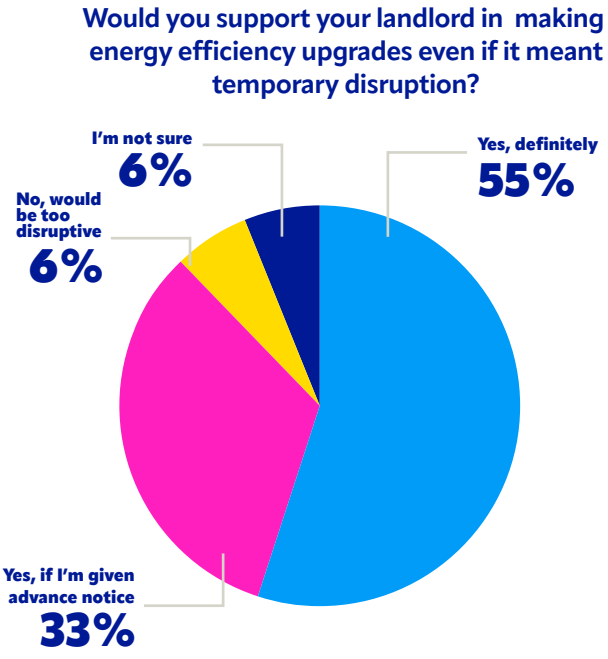


SUPPORT ENERGY EFFICIENCY UPGRADES

Tenants were asked whether they would support their landlord in making energy efficiency upgrades, for example, insulation, window replacement, even if it meant temporary disruption (e.g., noise, scaffolding).

Most tenants (88%) would support their landlord in making energy efficiency upgrades even if it meant temporary disruption.

Over half (55%) of tenants said they would support their landlord in making energy efficiency improvements, and one-third (33%) of tenants said they would be in support but would like to be given advance notice. Only 6% of tenants said they would not support their landlord due to the disruption.

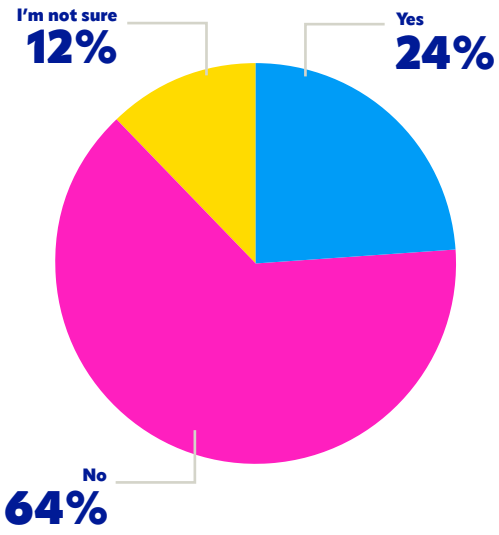


TRADITIONAL AND FACTORED PROPERTIES

According to recent research, the oldest pre-1919 tenements are the least efficient compared to other types of dwelling in Scotland[15].

Nearly a quarter (24%) of tenants in Scotland's private rented sector live in a traditional stone-built tenement property (typically built before 1919). One-third of these tenants are in receipt of benefits.

Do you currently rent a property in a traditional stone-built tenement property?



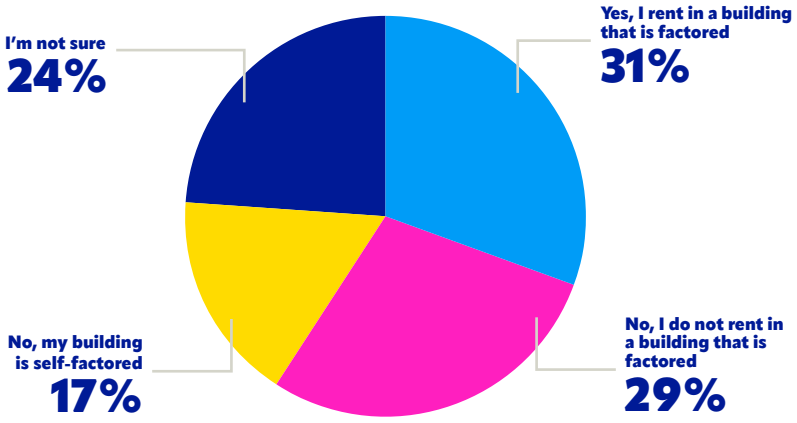
% of tenants who live in a traditional tenement property



Tenants were asked if the property they rent is in a building that is factored. A factor in Scotland is an agent responsible for organising and managing the upkeep of communal parts of a shared building. They coordinate repairs, arrange maintenance contracts, handle shared costs, and act as the main point of contact for residents on property management issues.

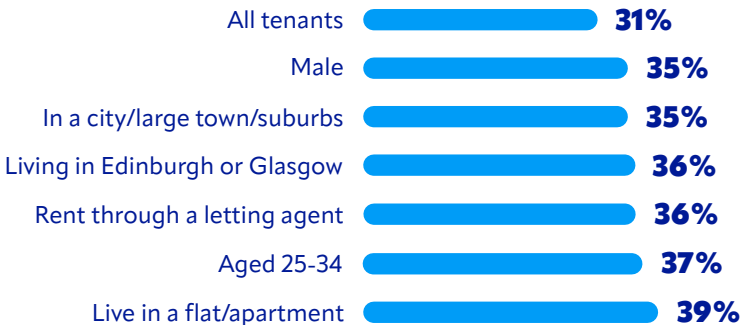
Around three in ten tenants (31%) rent a property in a building that is factored.

Do you rent a property in a building that is factored?



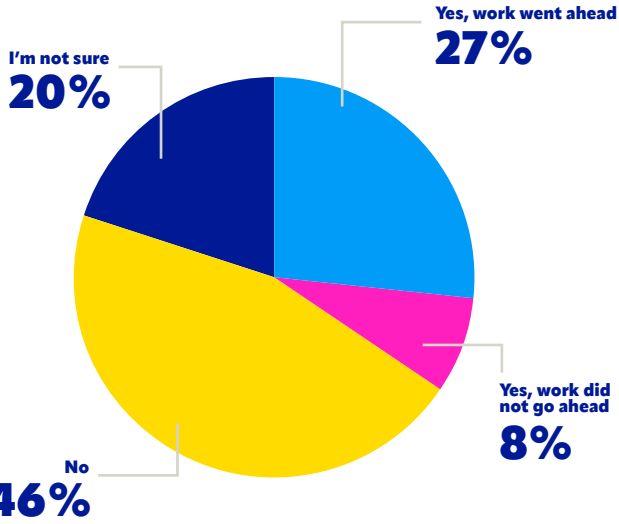
15 Built Environment Forum Scotland

% of tenants who rent a property in a building that is factored



Those tenants who rent a property in a factored building were asked if the property factor has ever proposed energy efficiency improvements to shared parts of the building (e.g, roof, walls, windows, or insulation). Over a third of tenants (35%) responded yes, and in most of the cases the work did go ahead (27%), with only 8% not going ahead.

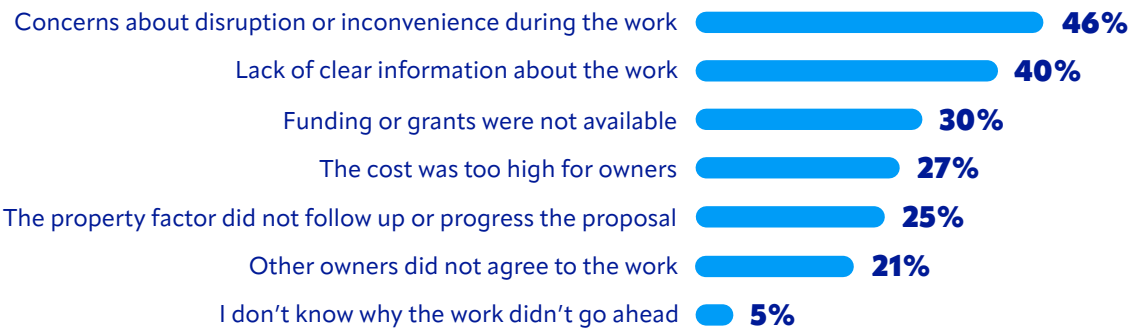
Has the property factor proposed energy efficiency improvements to shared parts of the building?



Tenants who report the energy efficiency improvements did not go ahead were asked the reasons for this.

Nearly half of these tenants (46%) report their main concern was around disruption or inconvenience during the work. Tenants also reported a lack of clear information about what the work involved (40%).

Reasons energy efficiency improvements didn't go ahead



CHAPTER SEVEN

Discussion

CONTINUITY AND CHANGE

Affordability has improved slightly since last year, though it remains a concern for many tenants. Fewer people are struggling to cover their monthly rent, and tenants are generally more satisfied with the outcomes when challenging rent increases via established redress processes than they were in 2024. While some tenants still find renting difficult to afford, more now say that their rent feels manageable, and interest in home ownership has grown compared with last year.

Patterns around security of tenure show a mix of stability and modest improvement. Overall satisfaction with being a tenant has remained steady, with slightly fewer people feeling dissatisfied. Although more tenants have moved in the past year, the difficulties they face when searching for and securing a new property remain broadly the same. Many would still like to move but feel unable to, and challenges such as finding an affordable home continue to be the most significant barrier. Tenants are also increasingly finding it difficult to secure a UK-based guarantor, adding another layer of complexity to the process.

Conditions in rented properties show some positive developments compared with last year. Slightly fewer tenants report experiencing issues, and those who do are now more likely to have their concerns fully resolved by their landlord or letting agent. Tenants also report greater confidence in where to take complaints, and formal routes, such as tribunals or local authorities, demonstrated a higher likelihood of fully addressing issues. The main reason tenants choose not to escalate problems remains the same: many simply do not consider the issue serious enough.

AFFORDABILITY

The findings show that affordability continues to be a key challenge for tenants in Scotland's private rented sector. As in 2024, almost one in three tenants find it difficult to afford their rent, and just under half are regularly cutting back on household essentials to meet their monthly rental payments. One in ten tenants have fallen behind on their rent by at least one month, and among those in arrears, over half are at least two months behind. Affordability issues are likely exacerbated by the cost-of-living crisis and related increases in the cost of food, fuel, and other essentials. Furthermore, wages and earnings have not kept up with inflation over the long term, particularly for those in lower-income categories.

While a significant majority of private renters aspire towards home ownership, with over three-quarters expressing a desire to buy – just under half are confident they won't be lifelong renters. Growing insecurity in recent years, including unstable employment, high deposit requirements, stricter lending criteria, and rising house prices, has been linked to people remaining in the private rented sector for longer periods[16]. This is likely reflected in people's expectations on their future housing trajectories.

Two in five tenants reported finding an affordable property as the most challenging aspect when looking for rental accommodation, and around one in five tenants would prefer to live in social housing. A key concern for policymakers is that the private rented sector is increasingly providing long-term housing for groups who, in the past, might have accessed local authority or housing association homes, with affordability emerging as a central issue[17]. While welfare benefits have generally risen with inflation, research has shown that only 8% of private tenants would have their rent covered by Local Housing Allowance (LHA), and only 1% of adverts for rental properties were below the LHA threshold[18].

RESOLVING TENANCY PROBLEMS AND DISPUTES

Although over half of tenants (58%) experienced an issue with their property in the last six months, nine in ten of these tenants reported the issue to their landlord or letting agent where the problem was either fully or partially addressed. For

16 Watson, James, & Gibb, (2024), Rapid Rehousing Action Plans: Assessing the Affordability of the Private Sector for LHA Recipients in Scotland. CIH/CaCHE.
17 Simcock et al. (September 2022). What do lower income tenants in Scotland's private rented sector want to see from a new Rented Sector?
18 Watson, James, & Gibb (2024), Rapid Rehousing Action Plans: Assessing the Affordability of the Private Sector for LHA Recipients in Scotland. CIH/CaCHE.

the minority of tenants whose issue was unaddressed, only 4% escalated their complaint to the First-tier Tribunal for Scotland, and only 11% complained to their local council. Among those who escalated their complaints the vast majority were happy with the response, indicating this system of redress is effective when used. However, the findings showed several barriers to uptake among tenants, such as a lack of awareness, conceptualisation of problem severity, and fear of disrupting relationships with landlords.

These findings echo a recent report published by Consumer Scotland which found that tenants can feel uncomfortable seeking formal advice on tenancy issues[19]. The report highlights that current redress routes can appear unwelcoming due to complex procedures, long waiting times, and fears of retaliation. It recommends that the Scottish Government take steps to ensure tenants have access to redress pathways that are timely, transparent, easy to navigate, and provide reassurance that they will be protected throughout the process.

VARIED EXPERIENCES OF THE PRIVATE RENTED SECTOR

Most private renters (71%) report being satisfied, and most live in adequately maintained properties and end their tenancies voluntarily when their housing needs change. However certain tenant group experience significant challenges within Scotland's private rented sector.

Tenants that can be classed as vulnerable face a range of specific challenges[20]. For instance, those living with long-term mental or physical health conditions find it difficult to find a rental property. Tenants who are in receipt of benefits to help pay their rent are also more likely to struggle with issues relating to affordability, insecurity, and property conditions. As a result, vulnerable tenants may be at greater risk of experiencing compounded harm due to their living conditions[21]. While the extent and impact of these issues warrant further investigation, further reforms and interventions in the PRS should aim to improve the housing experience of vulnerable groups.

ATTITUDES TOWARDS ENERGY EFFICIENCY

In August 2025, around one in three tenants found it difficult to afford energy bills. Therefore, it is unsurprising that the findings showed that 45% of tenants report the energy efficiency of their property could be improved, and most tenants (88%) consider energy efficiency important when choosing a rental property. Despite this, over half (63%) of tenants had not asked their landlord or letting agent to make energy efficiency improvements, mainly due to concerns around potential repercussions such as a rent increase or not wanting to cause hassle.

According to a recent report by Citizens Advice Scotland, many people in Scotland are living in poor conditions arising from poor energy efficiency and fuel poverty[22]. The report recommends that the Scottish Government should ensure that landlords can access grants and loans and advice to help carry out energy efficiency improvements to their properties. While also ensuring that tenants can access advice to understand their rights around these regulations.

19 Ablett & Barnett, (September 2025), Exercising tenancy rights in Scotland's private rented sector. Consumer Scotland.
20 David Rhodes and Julie Rugg provide a definition of vulnerability in their 2018 article 'Vulnerability amongst Low-Income Households in the Private Rented Sector in England', Centre for Housing Policy, University of York
21 Indigo House, 'Rent Better: Wave 3 Landlord and Letting Agent Survey Findings', September 2024, Nationwide Foundation
22 Deery & Lee, (June 2025), Left in the cold: Experiences of damp and mould in Scotland, Citizens Advice Scotland

Appendix

For the purpose of this report, Scottish councils were put into the following groupings:

Edinburgh and Glasgow

City of Edinburgh

East Dunbartonshire

East Lothian

East Renfrewshire

Glasgow City

Midlothian

North Lanarkshire

Renfrewshire

South Lanarkshire

West Lothian

West Dunbartonshire

Aberdeen and Dundee

Aberdeen City

Aberdeenshire

Angus

Dundee City

Rest of the central belt

Clackmannanshire

East Ayrshire

Falkirk

Fife

Inverclyde

North Ayrshire

South Ayrshire

Stirling

Rural areas

Argyll and Bute

Comhairle nan Eilean Siar

Dumfries and Galloway

Highland

Moray

Orkney Islands

Perth and Kinross

Scottish Borders

Shetland Islands

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