

Q3 2026 Property Market Intelligence Report

Edinburgh, the Lothians, Fife and the Scottish Borders

Average selling prices rise 0.7% year-on-year across ESPC regions

Market overview

The residential property market across Edinburgh, the Lothians, Fife and the Scottish Borders showed signs of cooling in Q3 2026, with sales volumes falling and buyer pressure easing compared with the same period last year. Average selling prices nevertheless edged up by 0.7%, while properties took slightly longer to go Under Offer and continued to achieve above their Home Report valuations on average.

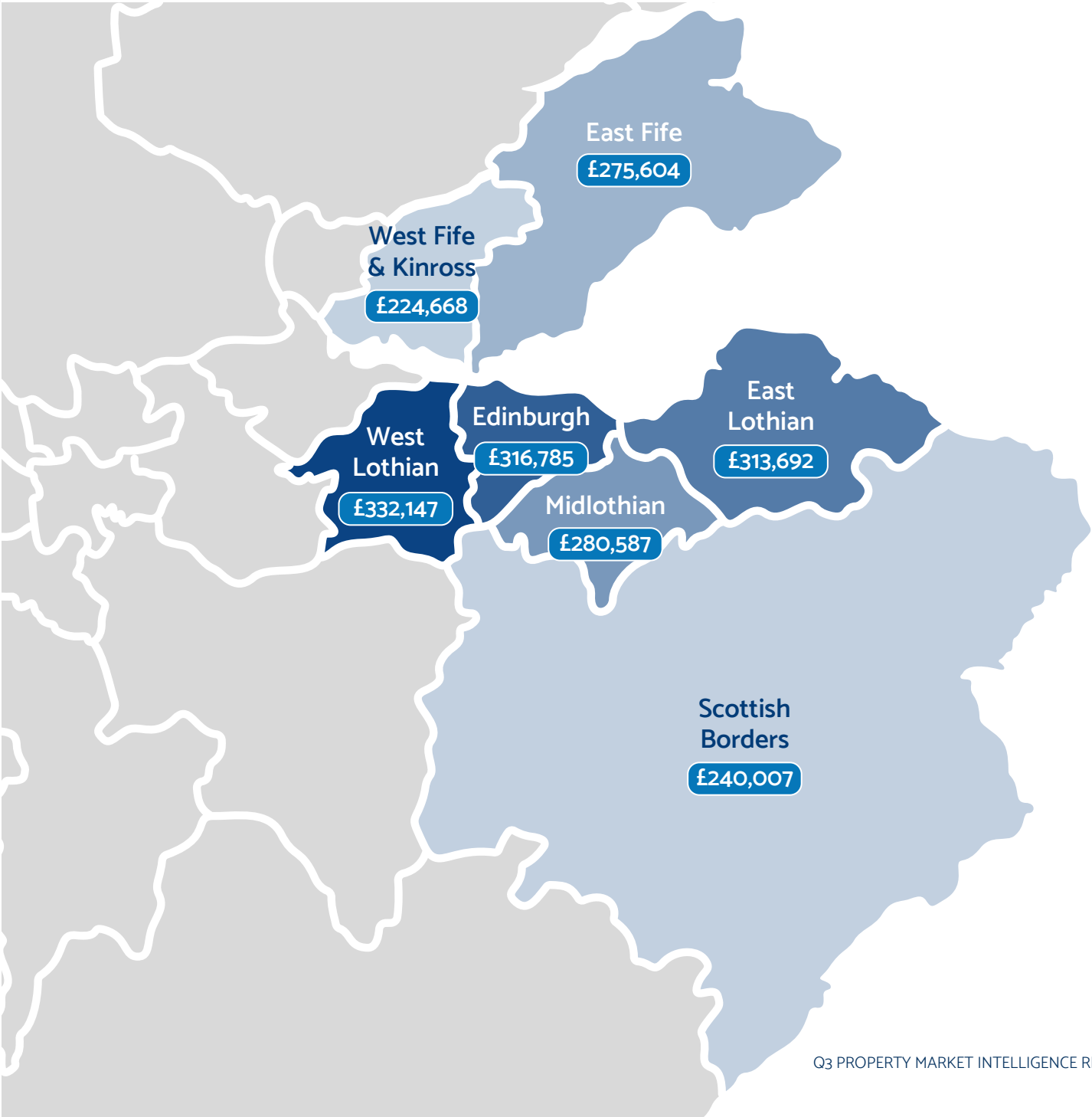
The wider economic climate appears to be weighing on market activity, with increased household costs contributing to more cautious buyer behaviour. Sales volumes fell by 9.6% year-on-year, while the average

percentage of Home Report value achieved declined by 0.5 percentage points to 101.9%. The proportion of sales going to a closing date also fell, suggesting less competition between buyers and fewer properties attracting multiple offers.

Regional trends were mixed, with West Lothian and the Scottish Borders recording notable price growth, while East Lothian, East Fife and West Fife & Kinross saw average prices decline. Overall, however, demand remains evident for well-priced properties, with homes still achieving premiums over Home Report valuations despite a more measured and price-sensitive market.

	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£298,870	+ 0.7%	+ 4.3%
Median days to Under Offer	22	+ 1 day	No change
% of HR value achieved	101.9%	- 0.5% pts	- 0.4% pts
% of sales going to closing date	18.8%	- 3.3% pts	- 3.2% pts

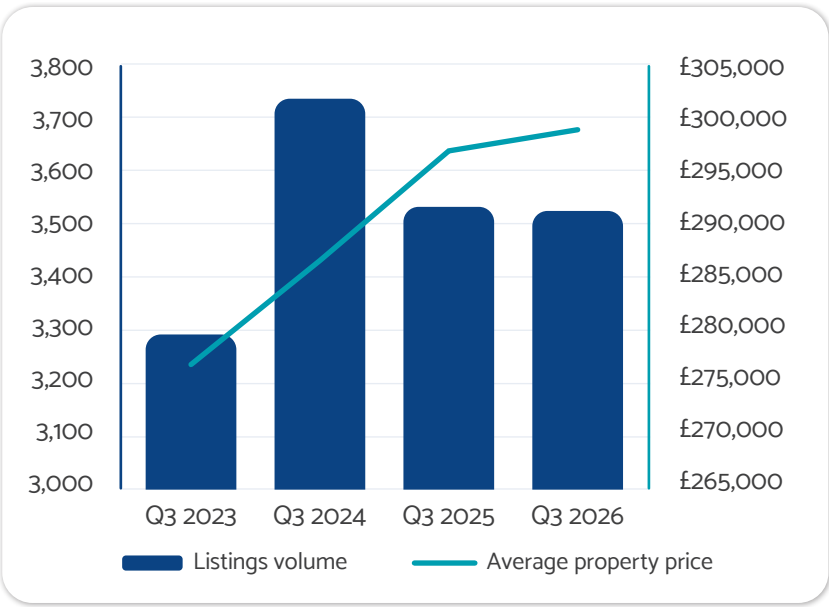
Average selling prices across ESPC regions



Key highlights

- Average price: £298,870
- Sales volume down 9.6%
- Time to sell slower
- Percentage over Home Report achieved remains strong

Listing volume & Average price trends



Regional market comparison

Performance across ESPC regions was varied, with West Lothian recording the highest average property price, while the Scottish Borders was the only area to see sales activity increase year-on-year. Edinburgh remained the busiest market, reflecting continued buyer demand amid a slight increase in average prices.

Time to sell also varied across the regions, with West Fife & Kinross continuing to notably outpace the overall market speed, whilst also achieving the highest premiums above Home Report value. Overall, the figures point to a property market that is cooling rather than contracting, with the wider economic backdrop continuing to influence buyer behaviour.

	Average price	YoY change	Sales volume YoY change	Median days to Under Offer	% of HR
Edinburgh	£316,785	+0.9%	-10.0%	21 days	102.5%
East Lothian	£313,692	-4.7%	-6.3%	27 days	101.8%
Midlothian	£280,587	+3.5%	-8.2%	23 days	101.1%
West Lothian	£332,147	+13.2%	-26.2%	37 days	100.9%
West Fife & Kinross	£224,668	-2.9%	-21.4%	16 days	102.7%
East Fife	£275,604	-2.5%	-17.5%	45 days	97.9%
Scottish Borders	£240,007	+9.0%	+16.0%	31 days	99.6%

Q3 stand-out performers

Highest average priceWest Lothian (£332,147)

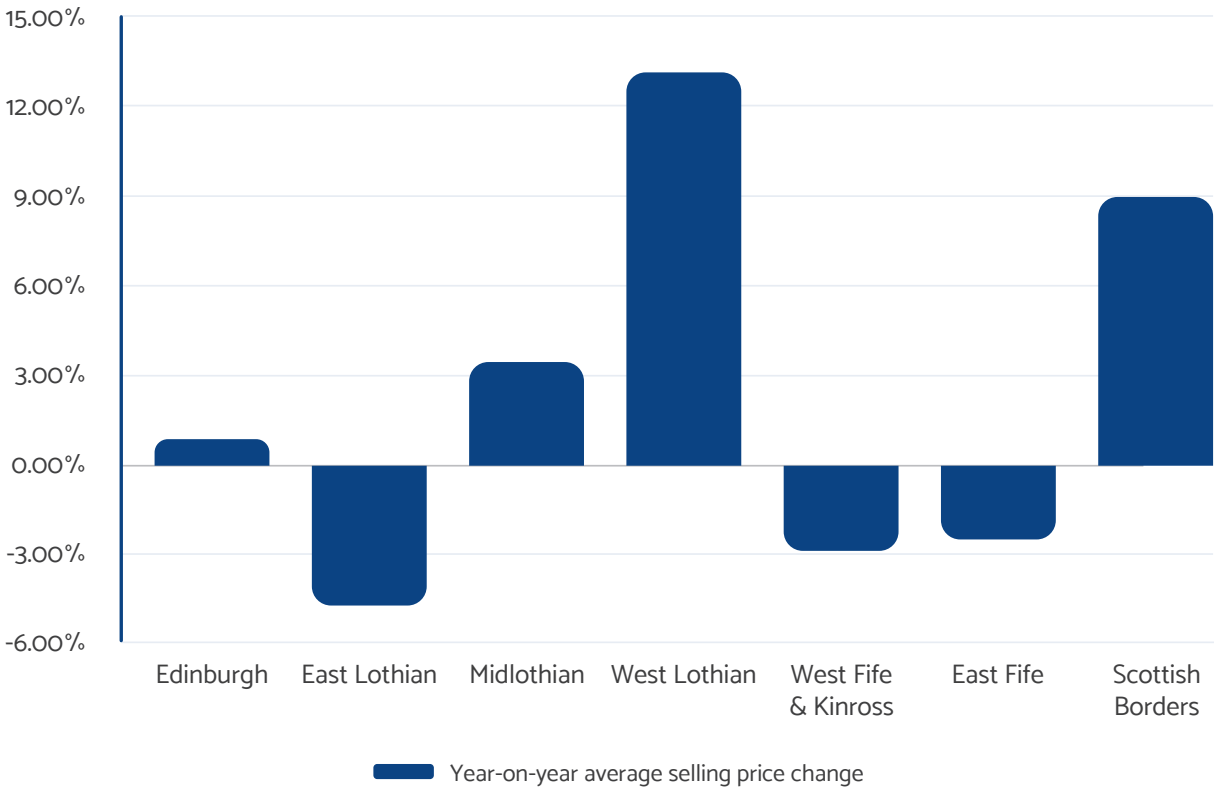
Strongest sales volume increaseScottish Borders (+16.0%)

Highest average price increaseWest Lothian (+13.2%)

Fastest selling marketWest Fife & Kinross (16 days)

Strongest performance over Home ReportWest Fife & Kinross (102.7%)

Annual average price change by region



Price growth differs across ESPC regions, with more than half of the regions experiencing growth, particularly West Lothian and the Scottish Borders.

Edinburgh

The Edinburgh property market remained relatively stable in Q3 2026, with average selling prices rising 0.9% year-on-year to £316,785. While sales volumes have fallen, listings edged up and properties continued to sell in 21 days, achieving 102.5% of Home Report value. The sharp increase in the use of Offers Over pricing, which grew from 76.2% to 88.3% year-on-year, also points to continued seller confidence.

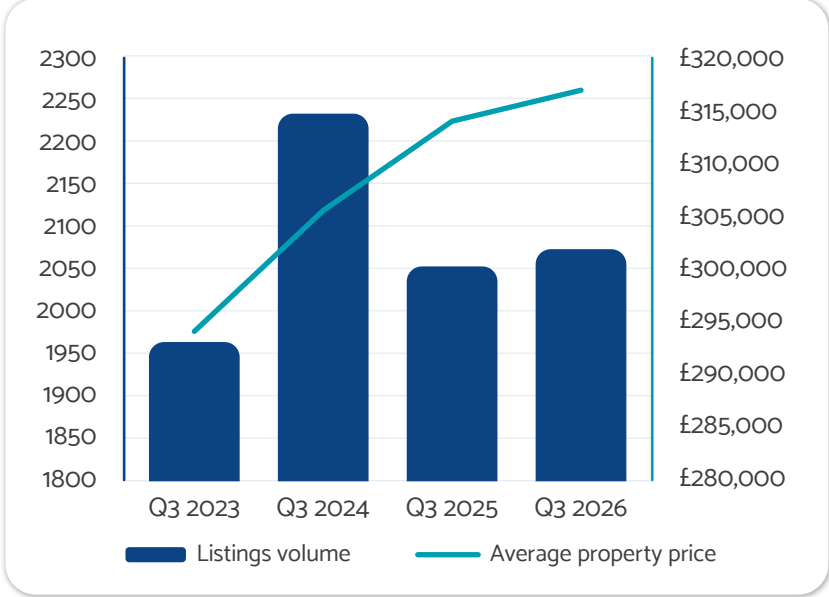


	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£316,785	+ 0.9%	+ 3.5%
Median days to Under Offer	21	No change	- 2 days
% of HR value achieved	102.5%	- 0.2%	No change
% of sales going to closing date	21.9%	-3.0% pts	-2.8% pts

Key highlights

- Average price: £316,785
- Sales volume down 10.0%
- Time to sell remained the same
- Percentage over Home Report achieved remains strong

Listing volume & Average price trends



Quickest selling properties



South Queensferry
Property type: First floor flat
Time to Under Offer: 2 days
Marketed selling price: Offers over £110,000



Colinton
Property type: Ground floor flat
Time to Under Offer: 2 days
Marketed selling price: Offers over £340,000



Gorgie
Property type: First floor flat
Time to Under Offer: 3 days
Marketed selling price: Offers over £160,000

East Lothian

East Lothian saw average selling prices fall 4.7% year-on-year to £313,692 in Q3 2026, although homes continued to achieve strong results at 101.8% of Home Report value. Properties took 27 days to reach Under Offer, while sales and listings both edged down. Offers Over pricing became more prevalent, with 85.0% of properties using the strategy compared with 72.1% last year.

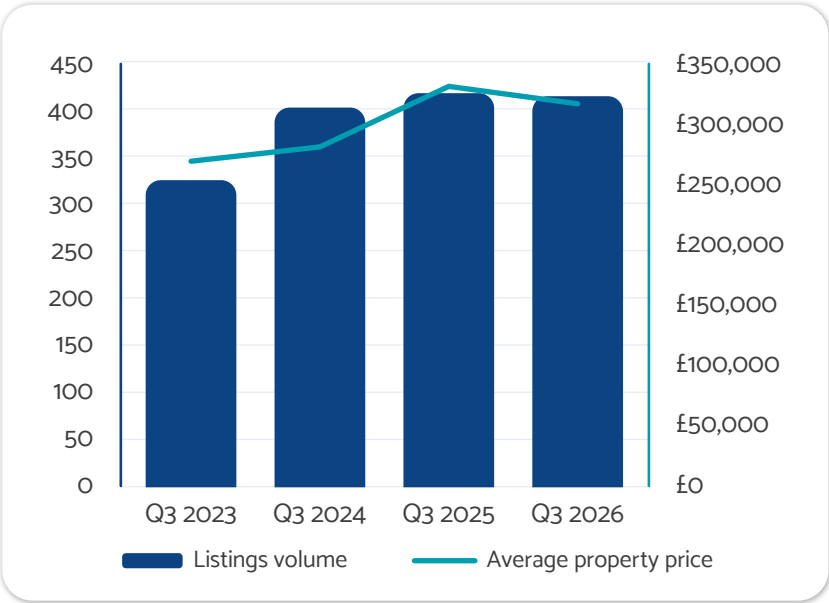


	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£313,692	- 4.7%	+ 12.1%
Median days to Under Offer	27	No change	+ 7 days
% of HR value achieved	101.8%	- 0.7%	- 1.1%
% of sales going to closing date	20.1%	- 1.2% pts	- 7.0% pts

Key highlights

- Average price: £313,692
- Sales volume down 6.3%
- Time to sell remained the same
- Percentage over Home Report achieved remains strong

Listing volume & Average price trends



Quickest selling properties



Haddington

Property type: **Detached house**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £400,000**



Dunbar

Property type: **Detached house**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £325,000**



Elphinstone

Property type: **Detached bungalow**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £345,000**

Midlothian

Midlothian recorded another year of price growth in Q3 2026, with the average selling price reaching £280,587, up 3.5% annually. Market activity was more subdued, with sales volumes and listings both falling, while the median time to Under Offer increased to 23 days. Despite this, properties continued to achieve 101.1% of Home Report value, with Offers Over now used for 85.6% of homes.

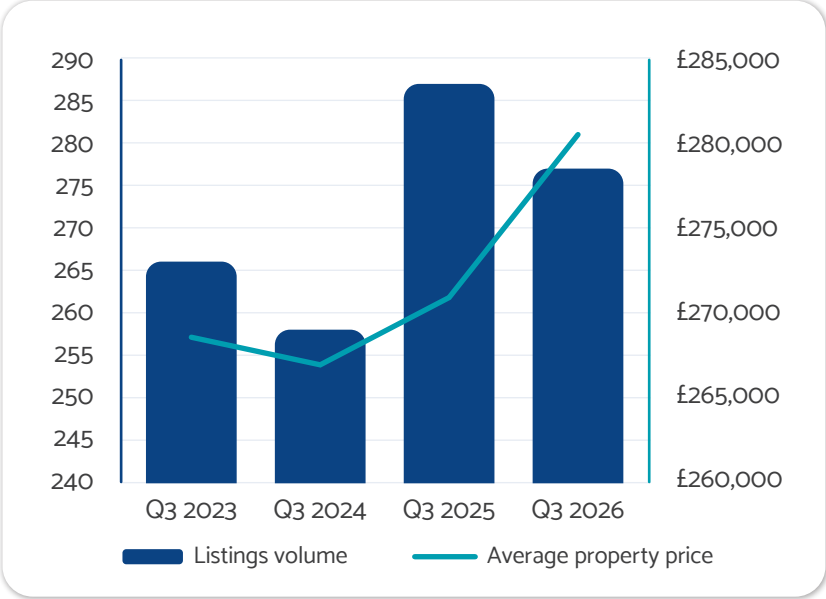


	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£280,587	+ 3.5%	+ 4.9%
Median days to Under Offer	23	+ 5 days	- 5 days
% of HR value achieved	101.1%	- 1.3%	- 0.2%
% of sales going to closing date	15.7%	- 5.6% pts	- 4.1% pts

Key highlights

- Average price: £280,587
- Sales volume down 8.2%
- Time to sell slower
- Percentage over Home Report achieved down

Listing volume & Average price trends



Quickest selling properties



Dalkeith
Property type: Semi detached bungalow
Time to Under Offer: 3 days
Marketed selling price: Offers over £265,000



Penicuik
Property type: Ground floor flat
Time to Under Offer: 3 days
Marketed selling price: Offers over £160,000



Pathhead
Property type: Semi detached house
Time to Under Offer: 4 days
Marketed selling price: Offers over £245,000

West Lothian

West Lothian stood out for its strong price performance in Q3 2026, with average selling prices jumping 13.2% year-on-year to £332,147. This growth came alongside a 28.6% increase in listings, although sales volumes fell by more than a quarter. Properties took 37 days to reach Under Offer, but continued to achieve 100.9% of Home Report value, suggesting buyers remain engaged despite increased supply.

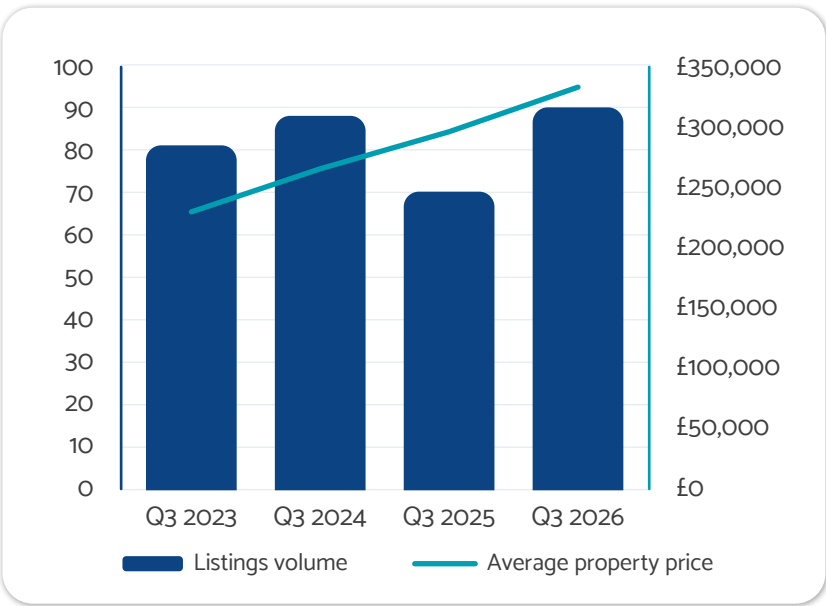


	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£332,147	+ 13.2%	+ 20.5%
Median days to Under Offer	37	No change	+ 17 days
% of HR value achieved	100.9%	+ 0.2%	- 0.7%
% of sales going to closing date	11.4%	- 2.6% pts	- 6.2% pts

Key highlights

- Average price: £332,147
- Sales volume down 26.2%
- Time to sell remained the same
- Percentage over Home Report achieved slightly up

Listing volume & Average price trends



Quickest selling properties

- Linlithgow**
Property type: **Ground floor flat**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £230,000**
- Newton**
Property type: **Cottage**
Time to Under Offer: **8 days**
Marketed selling price: **Offers over £285,000**
- Polbeth**
Property type: **Semi detached house**
Time to Under Offer: **17 days**
Marketed selling price: **Offers over £185,000**

East Fife

East Fife experienced a quieter quarter, with average selling prices falling 2.5% year-on-year to £275,604. Sales volumes and listings both dropped sharply, although properties did sell six days faster than last year, taking 45 days to reach Under Offer. Homes achieved 97.9% of Home Report value, while the significant increase in Offers Over pricing to 96.0% suggests sellers are continuing to pursue competitive offers.

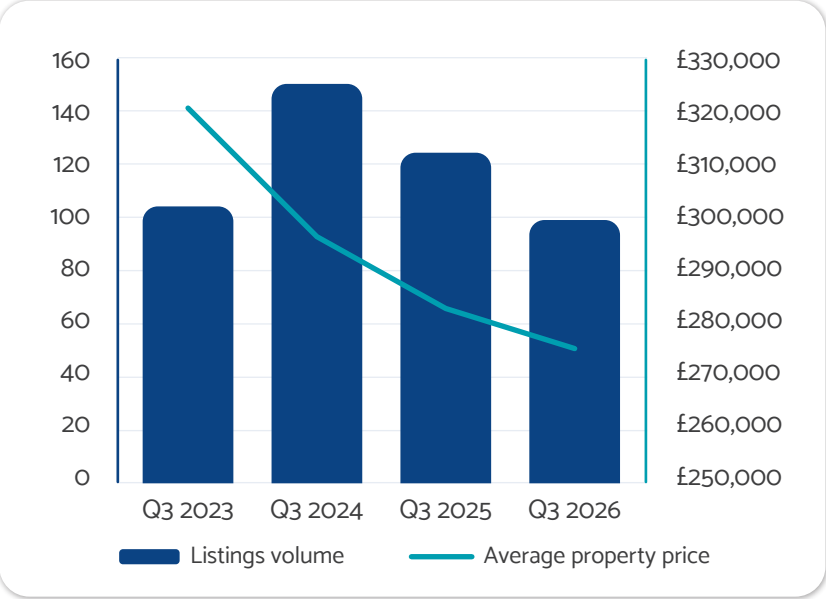


	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£275,604	- 2.5%	- 6.9%
Median days to Under Offer	45	- 6 days	+ 12 days
% of HR value achieved	97.9%	- 1.9%	- 3.9%
% of sales going to closing date	14.1%	- 5.1% pts	+ 1.7% pts

Key highlights

- Average price: £275,604
- Sales volume down 17.5%
- Time to sell faster
- Percentage over Home Report achieved decreased

Listing volume & Average price trends



Quickest selling properties



Anstruther
Property type: End terraced house
Time to Under Offer: 1 day
Marketed selling price: Offers over £155,000



Kirkcaldy
Property type: Semi detached house
Time to Under Offer: 6 days
Marketed selling price: Offers over £120,000



Cupar
Property type: Upper flat
Time to Under Offer: 8 days
Marketed selling price: Offers over £130,000

West Fife & Kinross

Properties in West Fife & Kinross continued to move particularly quickly in Q3 2026, with a median of just 16 days to Under Offer. Average selling prices dipped 2.9% year-on-year to £224,668, but homes still achieved 102.7% of Home Report value. Although listings fell 6.5%, competition remains a notable feature of the market with 90.5% of properties using Offers Over pricing.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£224,668	- 2.9%	+ 1.0%
Median days to Under Offer	16	+ 1 day	No change
% of HR value achieved	102.7%	- 0.7%	- 0.6%
% of sales going to closing date	12.8%	- 4.9% pts	- 3.7% pts

Key highlights

- Average price: £224,668
- Sales volume down 21.4%
- Time to sell slower but still the fastest region
- Percentage over Home Report achieved remains strong

Listing volume & Average price trends



Quickest selling properties

- Dunfermline**
Property type: **Top floor flat**
Time to Under Offer: **1 day**
Marketed selling price: **Offers over £150,000**
- Cowdenbeath**
Property type: **Ground floor flat**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £75,000**
- Cairneyhill**
Property type: **Detached house**
Time to Under Offer: **5 days**
Marketed selling price: **Offers over £325,000**

Scottish Borders

The Scottish Borders recorded a notable increase in market activity during Q3 2026, with sales volumes rising 16.0% and listings up 4.3% year-on-year. Average selling prices also climbed, rising 9.0% to £240,007. However, the median time to Under Offer increased to 31 days and homes achieved 99.6% of Home Report value, suggesting the stronger activity has not translated into faster sales or higher premiums.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£240,007	+ 9.0%	- 0.6%
Median days to Under Offer	31	+ 11 days	+ 4 days
% of HR value achieved	99.6%	- 0.5%	- 0.5%
% of sales going to closing date	8.1%	- 3.2% pts	- 0.9% pts

Key highlights

- Average price: £240,007
- Sales volume up 16.0%
- Time to sell slower
- Percentage over Home Report achieved dipped

Listing volume & Average price trends

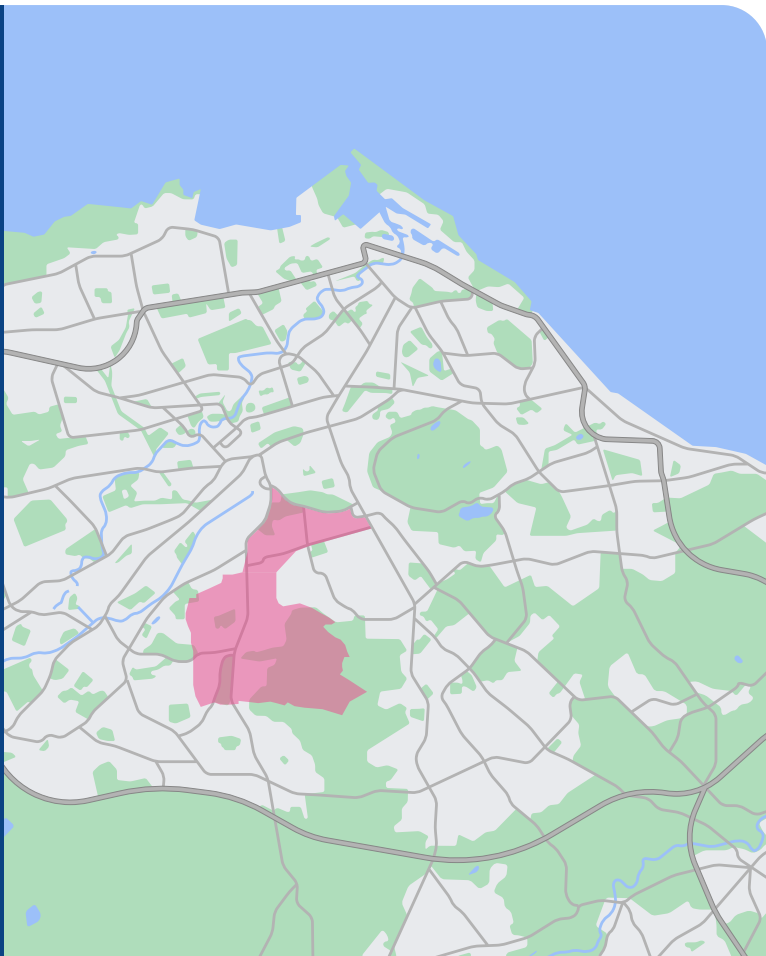


Quickest selling properties

- Jedburgh**
Property type: **Maisonette flat**
Time to Under Offer: **1 day**
Marketed selling price: **In the region of £85,000**
- Selkirk**
Property type: **Detached house**
Time to Under Offer: **1 day**
Marketed selling price: **Offers over £360,000**
- Gavinton**
Property type: **Semi detached bungalow**
Time to Under Offer: **3 days**
Marketed selling price: **Offers over £180,000**

Bruntsfield, Morningside & Marchmont

Bruntsfield, Morningside & Marchmont remained among Edinburgh’s higher-value neighbourhoods in Q3 2026, with average selling prices reaching £406,579, up 2.2% year-on-year. Two-bedroom flats continued to dominate sales, reflecting the area’s strong appeal to buyers seeking well-connected homes close to the city centre. Activity varied across the three neighbourhoods, with sales falling in Morningside and Marchmont but climbing an impressive 38.9% in Bruntsfield. Homes took a median 21 days to reach Under Offer and achieved 102.2% of Home Report value, while 92.1% were marketed using Offers Over pricing.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£406,579	+ 2.2%	- 4.3%
Median days to Under Offer	21	- 1 day	- 4 days
% of HR value achieved	102.2%	- 0.2%	+ 0.4%
% of sales going to closing date	20.7%	- 14.7% pts	- 2.8% pts

Key highlights

Average price: £406,579

Sales volume down slightly

Time to sell quickened by one day

Percentage over Home Report achieved decreased

Listing volume & Average price trends



Quickest selling properties



Marchmont

Property type: Retirement flat
Time to Under Offer: 2 days
Marketed selling price: Offers over £120,000



Marchmont

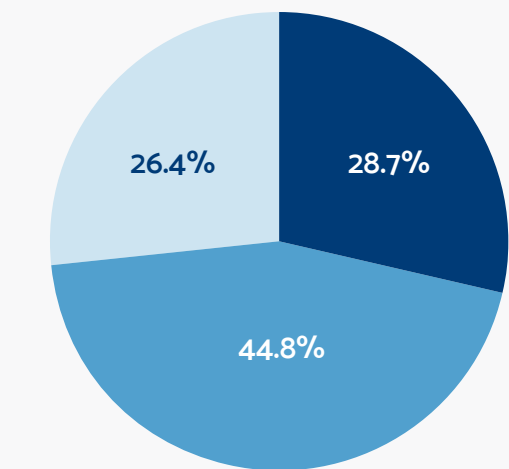
Property type: Top floor flat
Time to Under Offer: 4 days
Marketed selling price: Offers over £425,000



Morningside

Property type: First floor flat
Time to Under Offer: 15 days
Marketed selling price: Offers over £190,000

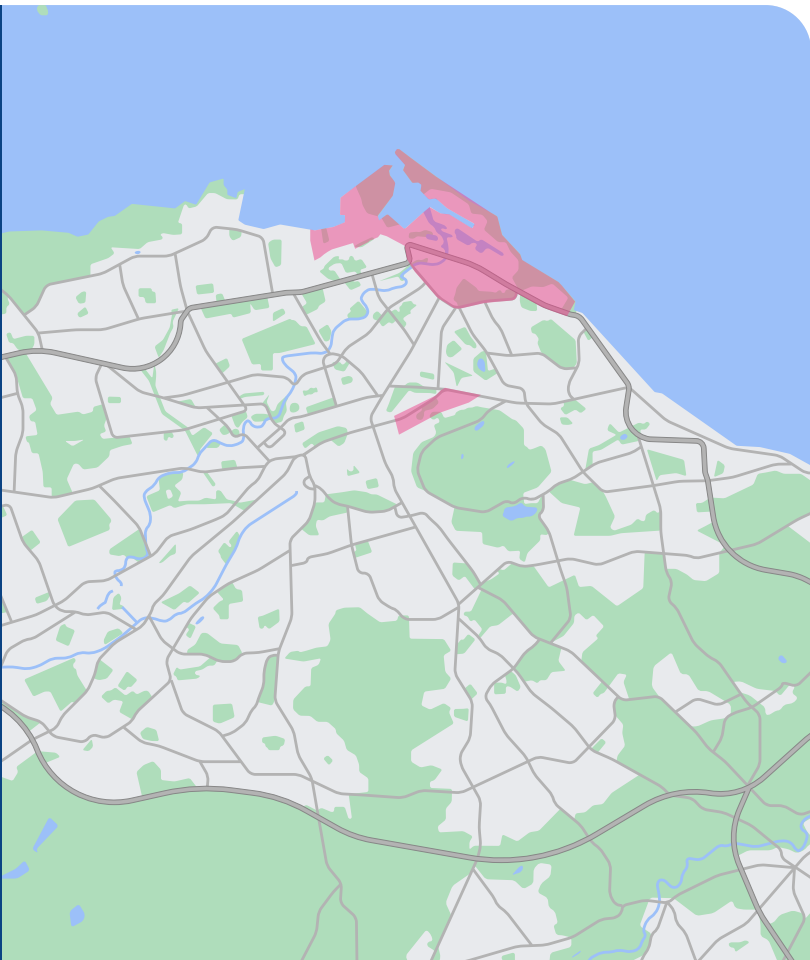
Sample sales volume indicator



■ Bruntsfield ■ Morningside ■ Marchmont

Leith, Abbeyhill & Newhaven

Leith, Abbeyhill & Newhaven saw modest price growth in Q3 2026, with average selling prices rising 2.2% year-on-year to £265,758. This popular north-eastern pocket of Edinburgh remains firmly flat-driven, with one- and two-bedroom properties accounting for most sales, although three-bedroom flat sales jumped 71.4%. Homes achieved 103.5% of Home Report value, down 1.3 percentage points annually but still 1.0 point above the Edinburgh average. Properties reached Under Offer in 18 days, despite fewer new listings, while the increased use of Offers Over pricing at 91.9% points to strong competition for available homes.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£265,758	+ 2.2%	+ 11.1%
Median days to Under Offer	18	+ 3 days	- 3 days
% of HR value achieved	103.5%	- 1.3%	- 0.4%
% of sales going to closing date	23.4%	- 6.3% pts	- 10.1% pts

Quickest selling properties



Leith
Property type: **First floor flat**
Time to Under Offer: **4 days**
Marketed selling price: **Offers over £290,000**



Leith
Property type: **Third floor flat**
Time to Under Offer: **5 days**
Marketed selling price: **Offers over £160,000**



Abbeyhill
Property type: **First floor flat**
Time to Under Offer: **7 days**
Marketed selling price: **Offers over £170,000**

Key highlights

Average price: £265,758

Sales volume up slightly

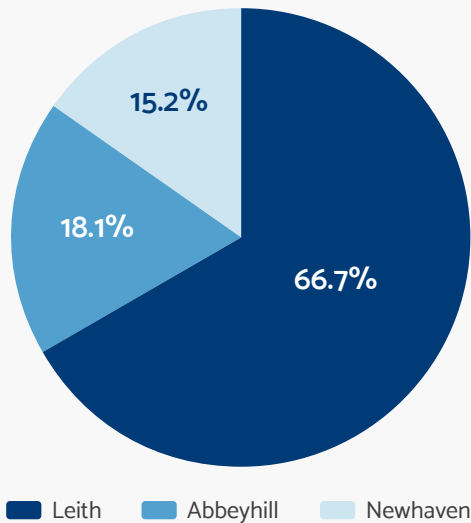
Time to sell slower

Percentage over Home Report achieved decreased slightly

Listing volume & Average price trends



Sample sales volume indicator



Stockbridge, Comely Bank & West End

The property market in Stockbridge, Comely Bank & West End enjoyed a strong Q3 2026, with average selling prices rising 9.3% year-on-year to £390,197. Sales volumes jumped 22.5%, despite a 9.2% fall in new listings, while properties sold in a median time of 21 days and achieved 102.2% of Home Report value. The market is predominantly flat-driven, reflecting the appeal of these sought-after, well-connected city neighbourhoods. Offers Over pricing was used for 84.7% of properties, up from 72.3% last year, highlighting strong competition among buyers. Comely Bank was particularly brisk, with homes reaching Under Offer in just 16 days.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£390,197	+ 9.3%	+ 3.8%
Median days to Under Offer	21	No change	- 13 days
% of HR value achieved	102.2%	+ 0.5%	+ 0.9%
% of sales going to closing date	30.6%	+ 5.6% pts	+ 20.3% pts

Quickest selling properties



Stockbridge

Property type: **Second floor flat**
Time to Under Offer: **6 days**
Marketed selling price: **Offers over £280,000**



Comely Bank

Property type: **Second floor flat**
Time to Under Offer: **7 days**
Marketed selling price: **Offers over £355,000**

Key highlights

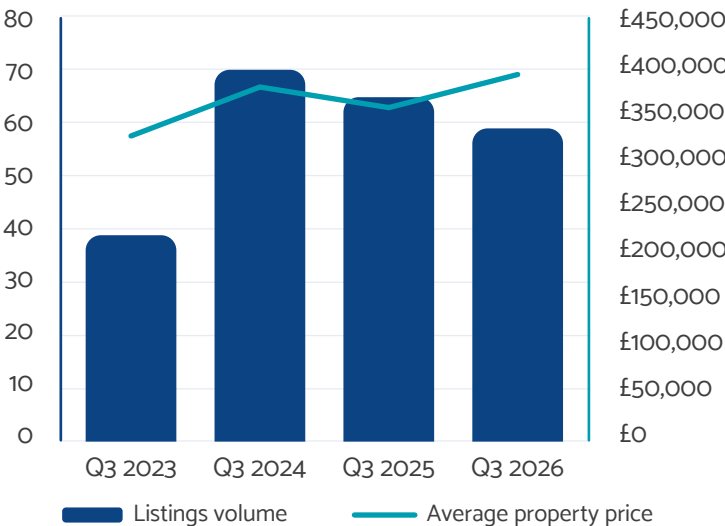
Average price: £390,197

Sales volume up notably

Days to sell remained the same as last year

Percentage over Home Report achieved increased

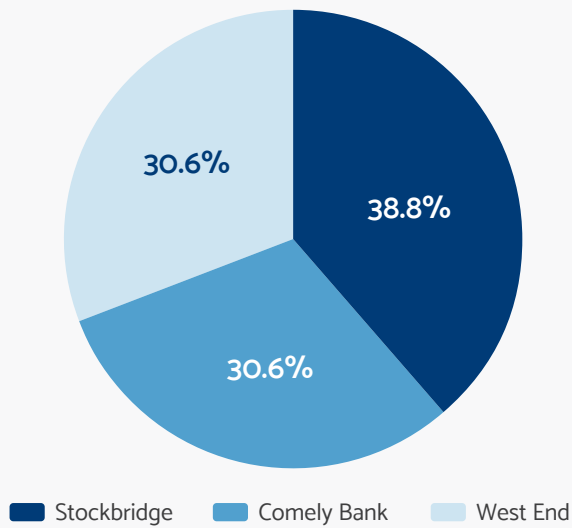
Listing volume & Average price trends



Stockbridge

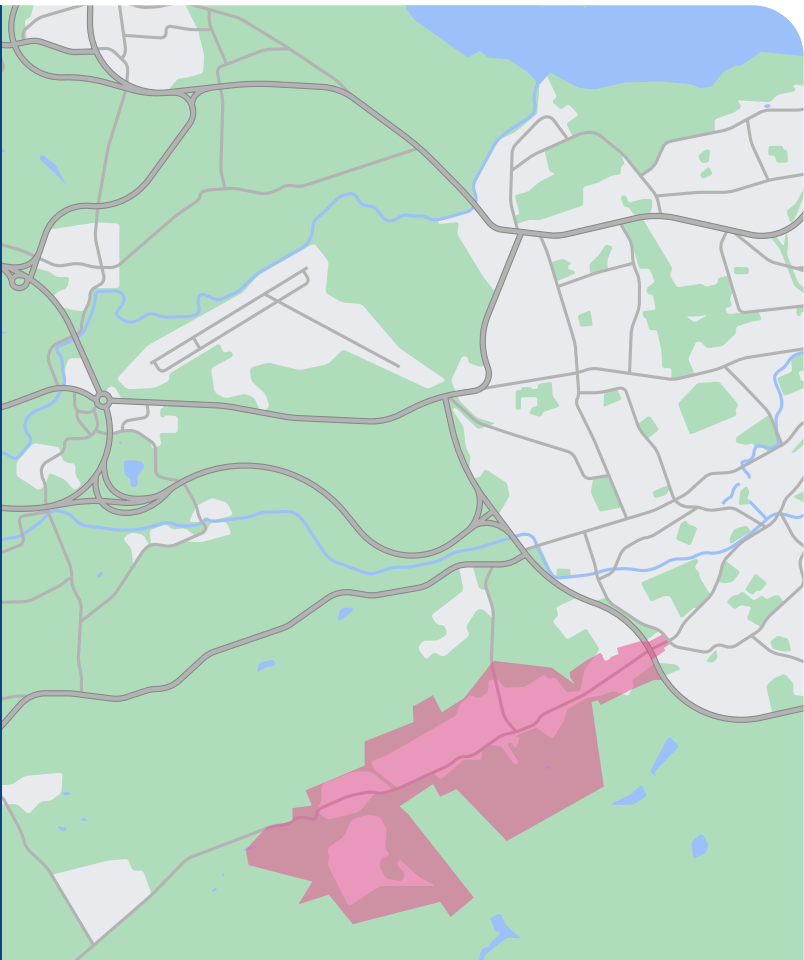
Property type: **First floor flat**
Time to Under Offer: **8 days**
Marketed selling price: **Offers over £300,000**

Sample sales volume indicator



Currie, Balerno & Juniper Green

Currie, Balerno & Juniper Green continued to attract buyers seeking spacious homes in attractive west Edinburgh surroundings, with average selling prices rising 3.5% year-on-year to £423,379. This is very much a house-driven market, with properties in Currie proving particularly sought after: houses reached Under Offer in just 14 days, eight days faster than last year. Although sales volumes fell 16.1%, new listings climbed by a notable 23.5%, suggesting a more active market as autumn approaches. Homes achieved 102.6% of Home Report value, while Offers Over pricing was used by 90.5% of properties, up sharply from 64.7%.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£423,379	+ 3.5%	+ 32.2%
Median days to Under Offer	23	+ 2 days	- 4 days
% of HR value achieved	102.6%	- 0.8%	+ 0.2%
% of sales going to closing date	32.7%	+ 5.3% pts	+ 13.0% pts

Quickest selling properties



Currie
Property type: **Detached house**
Time to Under Offer: **18 days**
Marketed selling price: **Offers over £490,000**



Currie
Property type: **Terraced house**
Time to Under Offer: **25 days**
Marketed selling price: **Offers over £250,000**

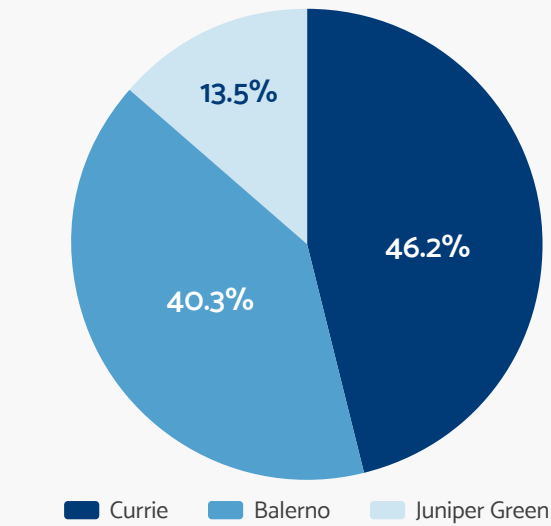
Key highlights

- Average price: £423,379
- Sales volumes down while new listings rise
- Time to sell slower
- Percentage over Home Report achieved remains strong

Listing volume & Average price trends

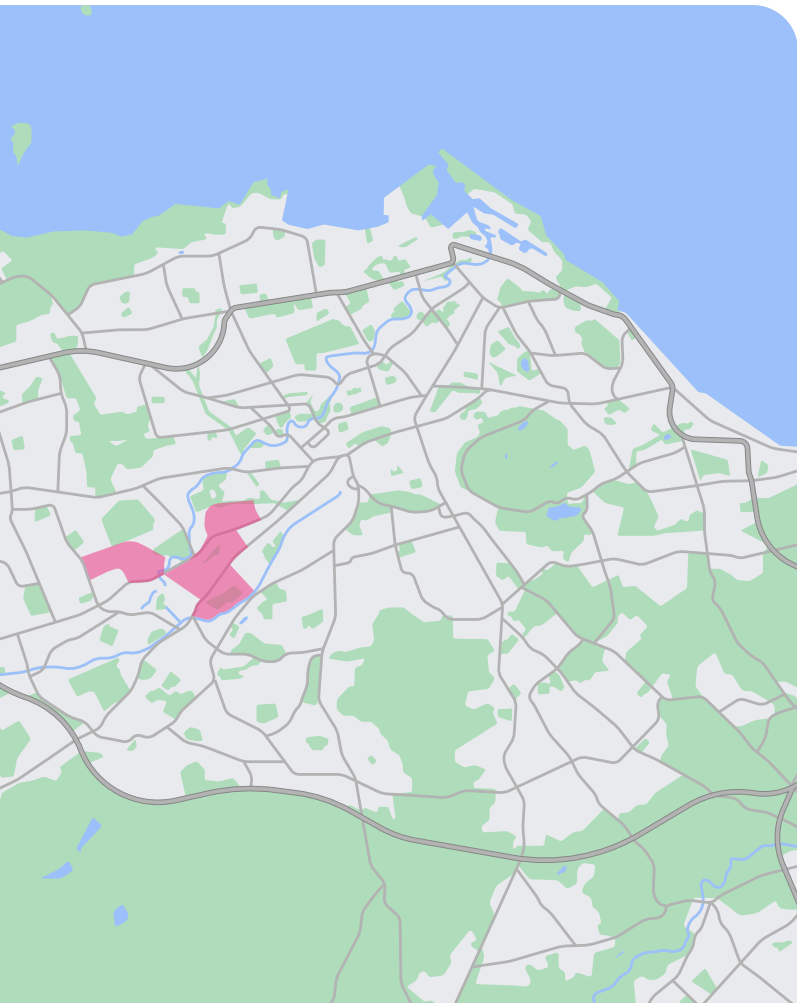


Sample sales volume indicator



Gorgie, Slateford & Stenhouse

It was a particularly lively quarter for Gorgie, Slateford & Stenhouse, with sales soaring 41.4% year-on-year. Average selling prices also climbed by 13.2% to £216,861, reinforcing the appeal of these well-connected areas, particularly for first-time buyers looking for an accessible route onto the property ladder. Flats continue to dominate the market, while overall listings rose by 7.5%. Properties took a median 27 days to reach Under Offer and achieved 101.4% of Home Report value. Notably, 91.7% of homes were marketed using Offers Over, compared with 67.2% last year - a substantial shift that reflects the strength of seller confidence and competition.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£216,861	+ 13.2%	+ 12.3%
Median days to Under Offer	27	+ 4 days	+ 5 days
% of HR value achieved	101.4%	- 0.7%	- 0.8%
% of sales going to closing date	11.0%	- 9.7% pts	- 7.8% pts

Quickest selling properties



Gorgie
Property type: **First floor flat**
Time to Under Offer: **3 days**
Marketed selling price: **Offers over £160,000**

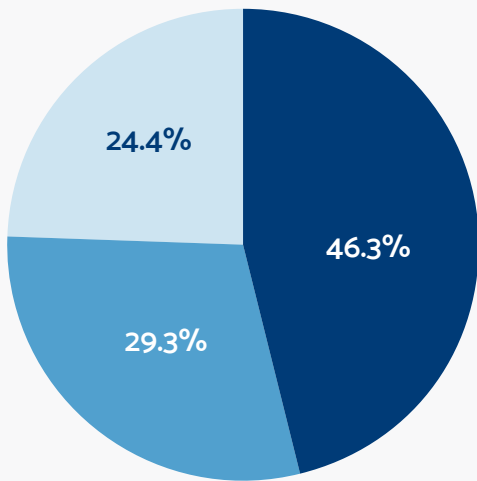


Slateford
Property type: **First floor flat**
Time to Under Offer: **6 days**
Marketed selling price: **Offers over £230,000**



Gorgie
Property type: **Top floor flat**
Time to Under Offer: **9 days**
Marketed selling price: **Offers over £220,000**

Sample sales volume indicator



Key highlights

Average price: £216,861

Sales volumes up significantly

Time to sell slower

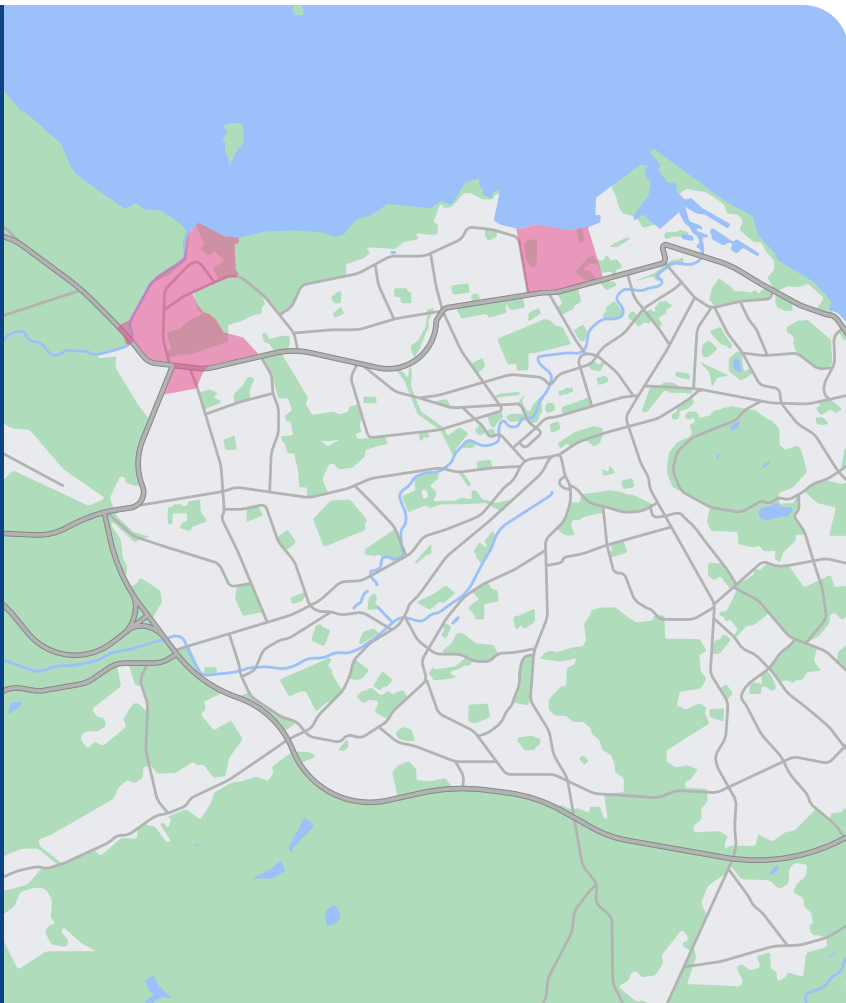
Percentage over Home Report achieved decreased slightly

Listing volume & Average price trends



Trinity, Cramond & Barnton

Trinity, Cramond & Barnton saw some of the strongest price growth across Edinburgh in Q3 2026, with average selling prices climbing 10.4% year-on-year to £431,605. These sought-after north-west neighbourhoods, known for leafy streets, attractive homes and easy access to the coast, saw a clear shift towards houses, with house sales increasing as flat sales declined. Houses achieved a particularly impressive 104.9% of Home Report value on average, helping push the overall figure to 103.3%. New listings rose 17.7%, while properties reached Under Offer in 23 days.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£431,605	+ 10.4%	+ 20.9%
Median days to Under Offer	23	- 3 days	- 5 days
% of HR value achieved	103.3%	+ 0.7%	+ 1.5%
% of sales going to closing date	26.3%	+ 1.3% pts	+ 2.5% pts

Quickest selling properties



Trinity
Property type: **Upper flat**
Time to Under Offer: **3 days**
Marketed selling price: **Offers over £180,000**



Trinity
Property type: **Second floor flat**
Time to Under Offer: **6 days**
Marketed selling price: **Offers over £290,000**



Trinity
Property type: **Top floor flat**
Time to Under Offer: **25 days**
Marketed selling price: **Offers over £315,000**

Key highlights

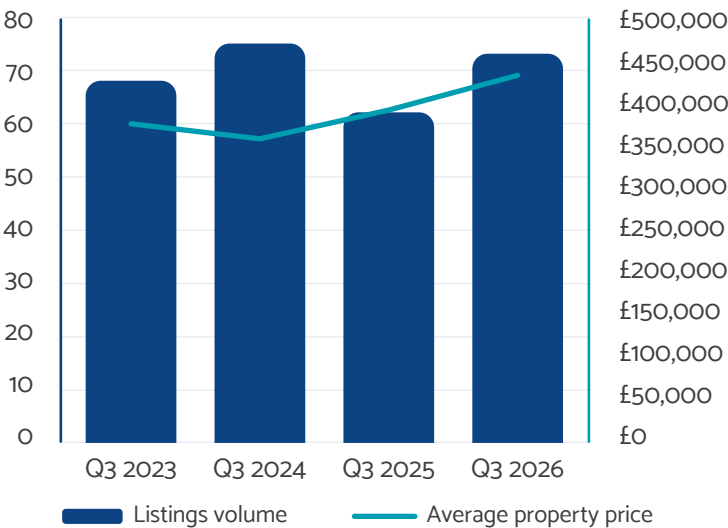
Average price: £431,605

Sales volumes of houses rose

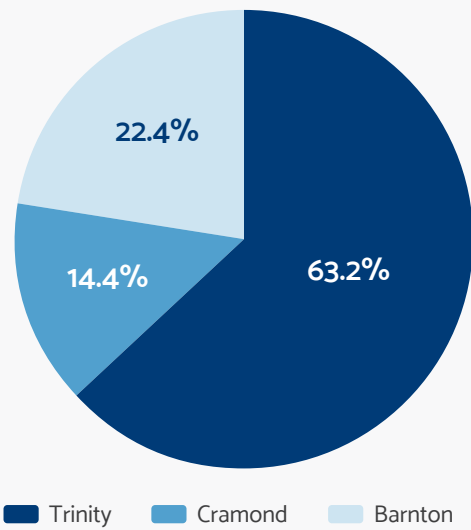
Time to sell was faster

Percentage over Home Report achieved increased

Listing volume & Average price trends

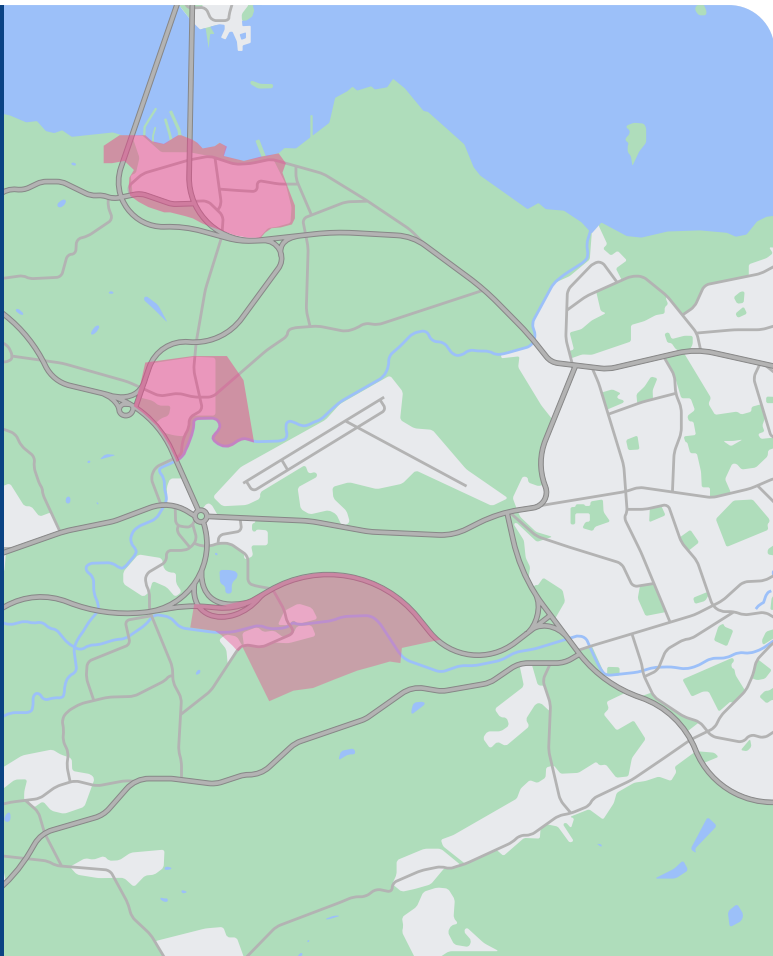


Sample sales volume indicator



South Queensferry, Kirkliston & Ratho

With its mix of family-friendly neighbourhoods and convenient routes into the city, South Queensferry, Kirkliston & Ratho remain popular with buyers looking for more space without sacrificing access to Edinburgh. The market is predominantly house-driven, with average selling prices reaching £317,530, up 1.4% year-on-year. However, activity was quieter in Q3 2026, with sales volumes falling 31.2% and new listings down 21.9%. Properties took a median 41 days to reach Under Offer and achieved 100.3% of Home Report value. Offers Over pricing was used for 73.7% of properties, up from 69.9% last year.



	Q3 2026	vs. 1 year ago	vs. 2 years ago
Average selling price	£317,530	+ 1.4%	+ 8.2%
Median days to Under Offer	41	+ 7 days	+ 19 days
% of HR value achieved	100.3%	- 0.2%	- 1.8%
% of sales going to closing date	11.3%	- 1.7% pts	- 5.1% pts

Quickest selling properties



South Queensferry

Property type: **First floor flat**
Time to Under Offer: **2 days**
Marketed selling price: **Offers over £110,000**



Kirkliston

Property type: **Townhouse**
Time to Under Offer: **6 days**
Marketed selling price: **Offers over £280,000**

Key highlights

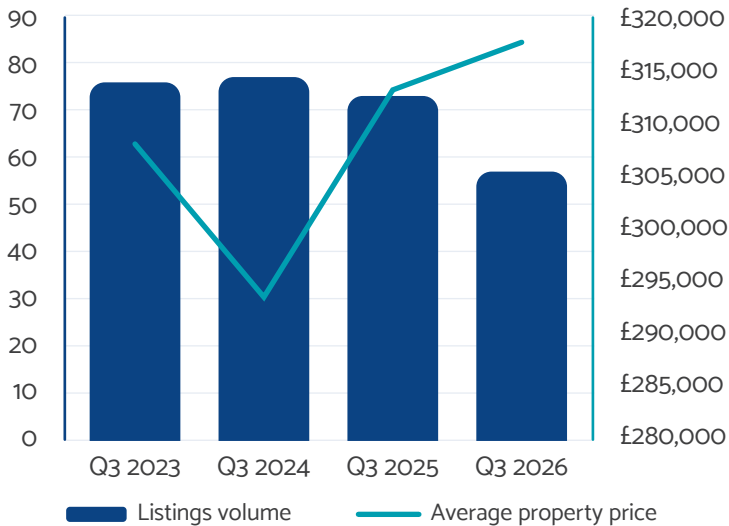
Average price: £317,530

Sales volume & listings down

Days to sell slower

Percentage over Home Report attained decreased slightly

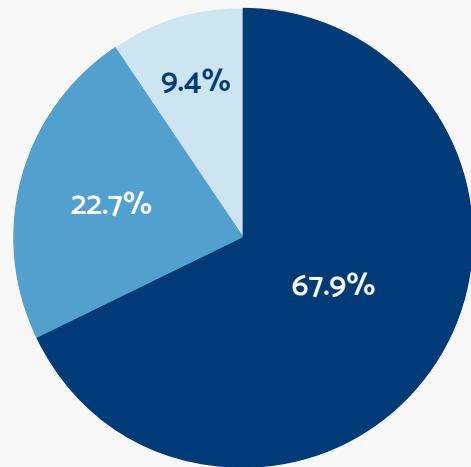
Listing volume & Average price trends



Kirkliston

Property type: **Semi-detached house**
Time to Under Offer: **13 days**
Marketed selling price: **Offers over £295,000**

Sample sales volume indicator



South Queensferry Kirkliston Ratho

Market trends and buyer behaviour

The property market across Edinburgh, the Lothians, Fife and the Borders entered a more cautious phase during Q3 2026, as ongoing economic uncertainty and affordability pressures influenced buyer behaviour. While average prices continued to rise slightly, lower sales volumes, fewer closing dates and increased fall-throughs point to a more cautious market, with affordability and local market conditions increasingly influencing buyer behaviour.



Supply

Steady supply gives buyers plenty of choice

The number of new properties coming to market remained broadly unchanged compared with last year, giving buyers a consistent level of choice despite the slower market. With properties taking longer to secure in some areas, buyers have more opportunity to consider their options and negotiate.

Pace

Market pace remains relatively steady

The market moved at a broadly similar pace to last year, with properties taking just one day longer to go under offer on average. However, the proportion of properties going to a closing date fell from 22% to just under 19%, suggesting less competition between buyers and giving them more opportunity to make considered offers.

Pricing

Prices remain resilient

Despite a more subdued market and lower sales volumes, average selling prices increased by 0.7% year on year to £298,870. With prices continuing to rise overall, the market has shown some resilience despite the more cautious conditions experienced during the quarter.

Demand

Well-priced homes remain sought after

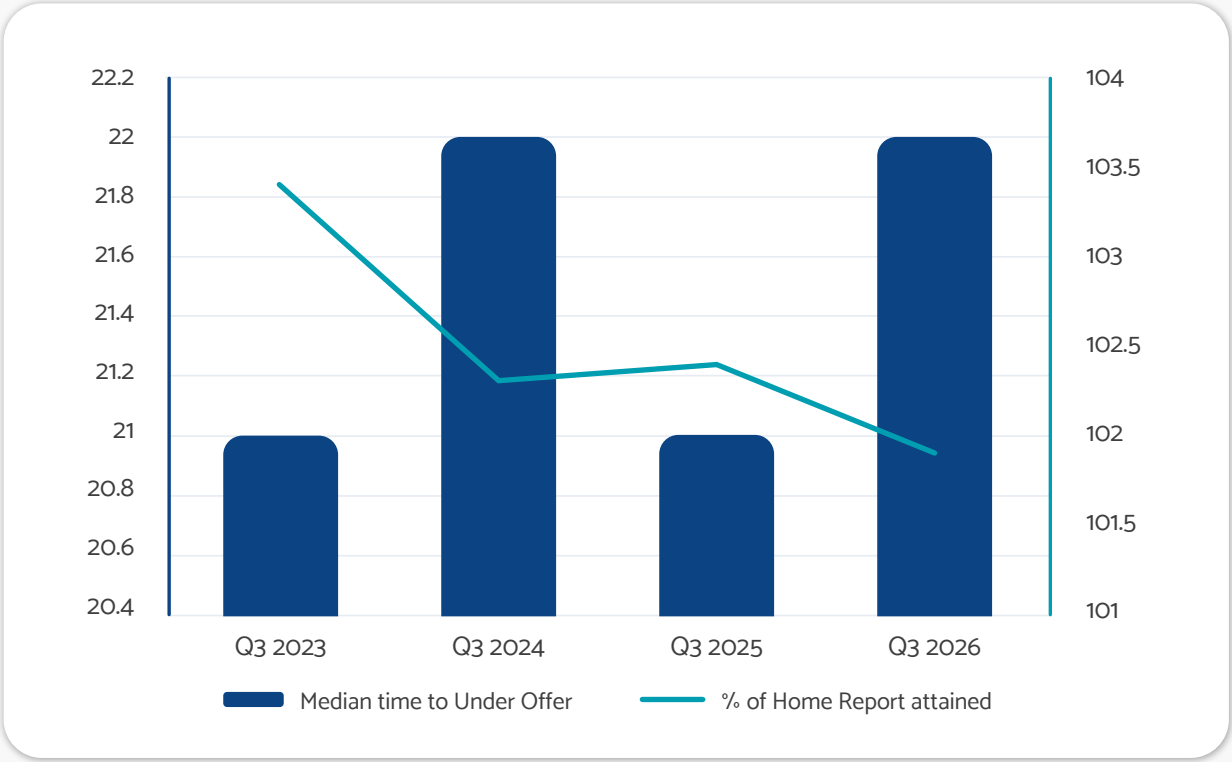
Properties achieved an average of 101.9% of their Home Report valuation, down 0.5 percentage points from last year. Although premiums have reduced, the figure still indicates demand for desirable, appropriately priced homes, particularly at the more affordable end of the market.

Local markets

Affordability shapes regional performance

Local markets continued to tell different stories. The Borders recorded a 9% rise in average prices to £240,007, while Dunfermline's average fell 7.7%, partly due to fewer sales of larger homes. Meanwhile, affordable properties continued to attract strong demand, with Gorgie one-bedroom flats and Dunfermline two-bedroom flats proving particularly popular.

Median time to Under Offer & % of Home Report attained trends



Although premiums have reduced, the market moved at a broadly similar pace to last year and demand remains for desirable, appropriately priced homes.

What this means for buyers and sellers

For sellers

The market has become more cautious compared with this time last year, with sales volumes down 9.6% and fewer properties going to a closing date. However, average selling prices still increased by 0.7% year-on-year, while homes achieved an average of 101.9% of their Home Report valuation. Sellers should therefore focus on realistic pricing and presenting their property effectively, while recognising that buyers may have less scope to pay significant premiums in the current economic climate. Understanding local market conditions will be particularly important when setting expectations and deciding on a selling strategy.

For buyers

The current market offers buyers an opportunity to take a more considered approach when searching for their next home. With fewer properties going to a closing date and reduced competition compared with last year, there may be less pressure to make significant offers above Home Report valuation. However, affordability remains an important consideration, and buyers should continue to assess their finances carefully and take the time to find a property that meets both their needs and budget.

For investors / landlords

For investors and landlords, the current market presents a range of potential opportunities, but a considered approach is essential. Changes in affordability and buyer behaviour mean that property performance can differ significantly, making it important to look beyond headline market figures. Understanding current demand, assessing the potential of individual properties and taking a long-term view can help investors make well-informed decisions.





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