

Edinburgh South Market Briefing May 2025

Edinburgh South – The *Jewel* in Edinburgh's Property Crown





Introduction

“Edinburgh is Scotland’s top performing housing market area, with an average house price higher than it is anywhere else in Scotland. Within the city itself, the Edinburgh South postcodes of EH9 and EH10 shine brighter than anywhere else. These districts contain some of the city’s most sought-after properties. Proximity to top schools, quality bars and restaurants, high quality greenspace and exceptional family friendly properties have led to a sustained premium on property prices in these areas. The area also has an active rental market and average rents are well above the city average. Rettie is now moving to Edinburgh South, with our office on Morningside Road due to open in June 2025.”

Best wishes,

Dr John Boyle MRICS
Director of Research & Strategy
john.boyle@rettie.co.uk
0131 624 4073



Rettie Are Moving to Edinburgh South



South Edinburgh is a charming and diverse part of the capital that blends historic elegance with modern convenience. Known for its beautiful, leafy streets, stunning Victorian and Georgian architecture, and proximity to natural beauty like the Pentland Hills and The Meadows, it offers a quieter, more residential feel than the bustling city centre. Following recent UK-wide changes to schooling fees for private education, school catchments have never been a more important factor when choosing where to raise your family. EH9 and EH10 benefits from excellent schooling options, green spaces, and useful transport links; it's a vibrant yet peaceful place to call home. Neighbourhoods such as Morningside, Bruntsfield and The Grange boast independent shops, cosy cafés and cultural venues, making EH9 and EH10 a favourite among families, professionals, and students alike.

Since rejoining Rettie in October 2024 as the Valuer for EH9 and EH10, I am acutely aware of the sense of community, vibrant culture, and exceptionally high quality of life that is on offer. There is a true sense of passion for the area shared among many residents and business owners, who often have spent most of their adult lives residing in the south of the city. We are here to not only match that level of enthusiasm and knowledge, but to ensure everyone finds their ideal next home, for whichever stage of life that might be for.

Laura Mathieson, Associate Director



As someone who has worked in Edinburgh's rental market for over 20 years, I've seen first-hand just how consistently popular the south side of the city is with renters. From Marchmont and Morningside to The Grange and Bruntsfield, these neighbourhoods attract a wide range of tenants — from professional couples and relocating families to students drawn to the area's character and proximity to the city's universities. The depth and variety of demand in EH9 and EH10 has long made these areas a stronghold for rental activity across all price points. I'm genuinely excited about the opportunities our new south side office brings to further support landlords and tenants here.

I am focused on bringing new rental properties into our portfolio and I bring with me not only decades of experience, but a deep understanding of what both landlords and tenants expect from their letting agent. Whether you're a homeowner renting out your property for the first time or an experienced landlord looking for a more proactive and tailored approach, Rettie is here to help you navigate the market with confidence.

Rob Trotter, Director of New Business - Lettings

Key findings.



01. The average house price in Edinburgh South is nearly 50% higher than it is in the city.

House prices in Edinburgh South continue to outstrip city-wide averages. Strong demand has seen both average price growth and transactional activity accelerating year-on-year.



02. Average rents boast a significant premium of 20-25% on the city-wide average.

Average rents in Edinburgh South are significantly higher than in other parts of the city, indicative of strong demand and lack of availability.



03. Rettie Maintain a Significant Market Share in Edinburgh South.

Rettie are one of the leading sales and rental agents in Edinburgh South. We listed more property for sale over £400k than any other agent in the area in the last 12 months.

Key findings *explored.*

01. The average house price in Edinburgh South is nearly 50% higher than it is in the city.

The Edinburgh South housing market continues to see **relatively strong house price growth**. The market has grown by over 4% in the last year compared to the city-wide growth rate of 1.6%. The house price premium in EH9 and EH10 is an impressive 46% over the city-wide average.

The total value of the EH9 and EH10 housing market reached almost £550 million in sales in the last 12 months, with strong recent transactional growth and price growth. This is 15% of the total Edinburgh market. **Sales transactions have grown by 19% in Edinburgh South in the last year** (compared to 9% in the city as a whole).

The most expensive streets in the last 12 months command a significant premium on the district and city-wide averages. In Cluny Drive and Midmar Gardens, average prices are close to £1.3 million.

£480,329

*EH9 and EH10 Average
house price year to date
(Jan-Mar)*

+4.3%

*Average EH9
and EH10 House
Price YoY*

£328,521

*City of Edinburgh house
price year to date
(Jan-Mar)*

+1.6%

*City of Edinburgh
House Price YoY
(Jan-Mar)*

£548,300,000

*EH9 and EH10 Total Market Turnover between
April 2024 and March 2025*

15% of Total Edinburgh Market



Warrender Park Road

Figure 1: Most Expensive Streets In Edinburgh South by Average House Price (last 12 months)

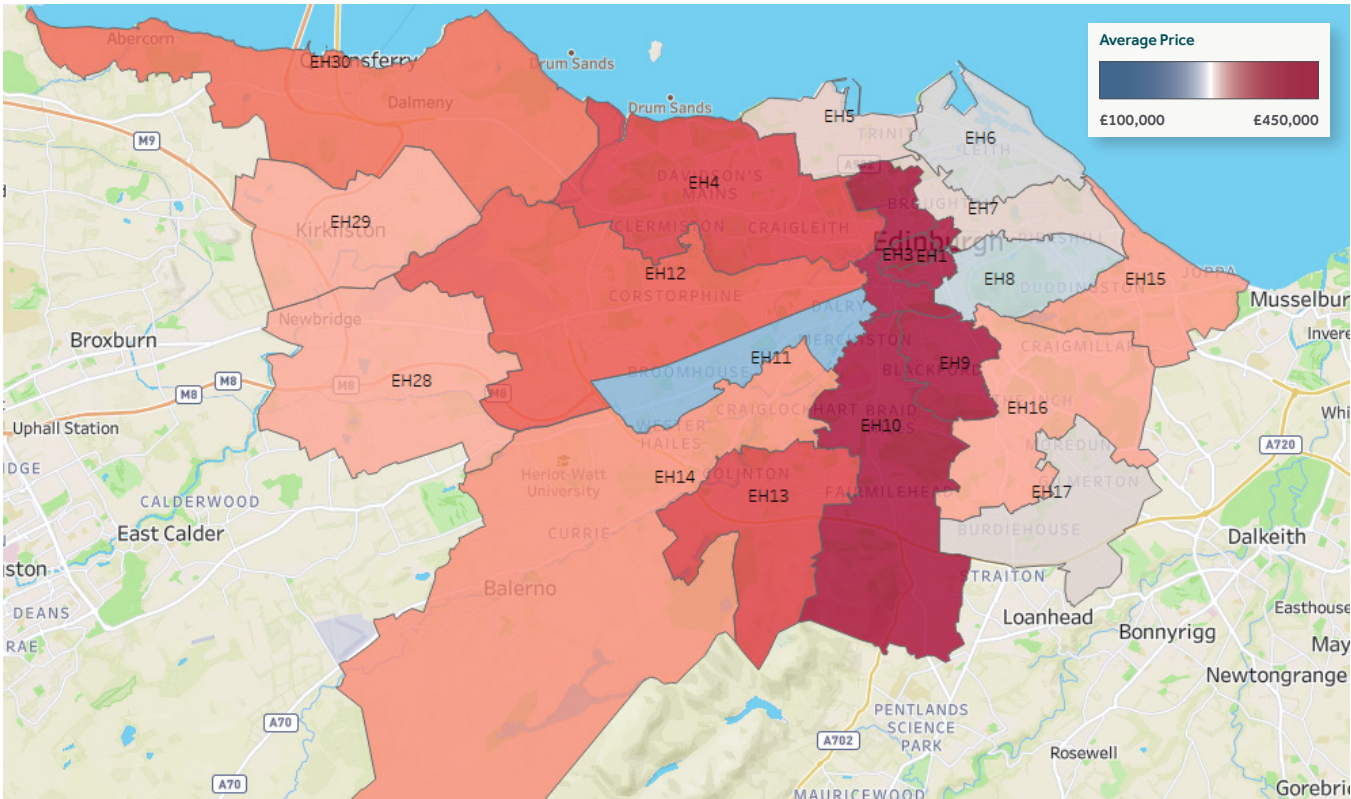
Street	Average Price Last 12 Months
Cluny Drive (EH10)	£1,286,111
Midmar Gardens (EH10)	£1,272,817
Fountainhall Road (EH9)	£974,167
Sassoon Grove (EH10)	£906,706
Findhorn Place (EH9)	£841,578

Note: Streets with 5 or more transactions in the last 12 months

Source: Crown Copyright Registers of Scotland



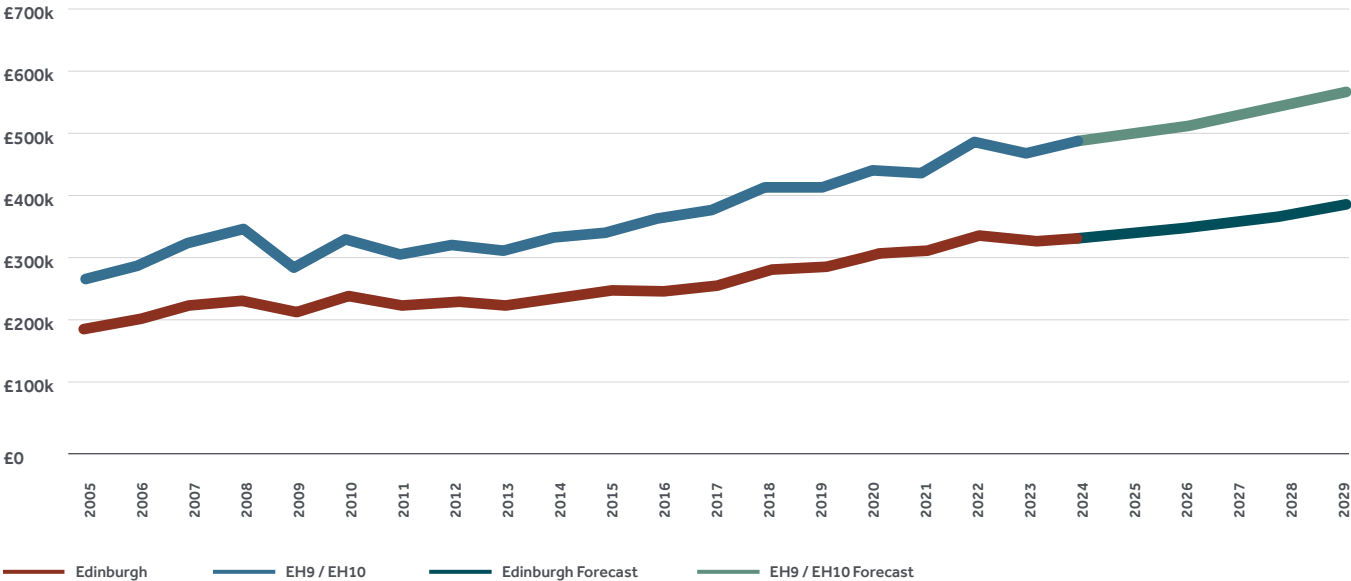
Figure 2: Heat Map of Average House Prices by Edinburgh Postcode District



Source: Crown Copyright Registers of Scotland

We anticipate that price growth will continue in Edinburgh South in succeeding years, with the average house price in the area approaching £600,000 by the end of the 2020s.

Figure 3: Actual and Forecast Average House Prices in Edinburgh South and Edinburgh City, 2005-29



Source: Crown Copyright Registers of Scotland and Rettie

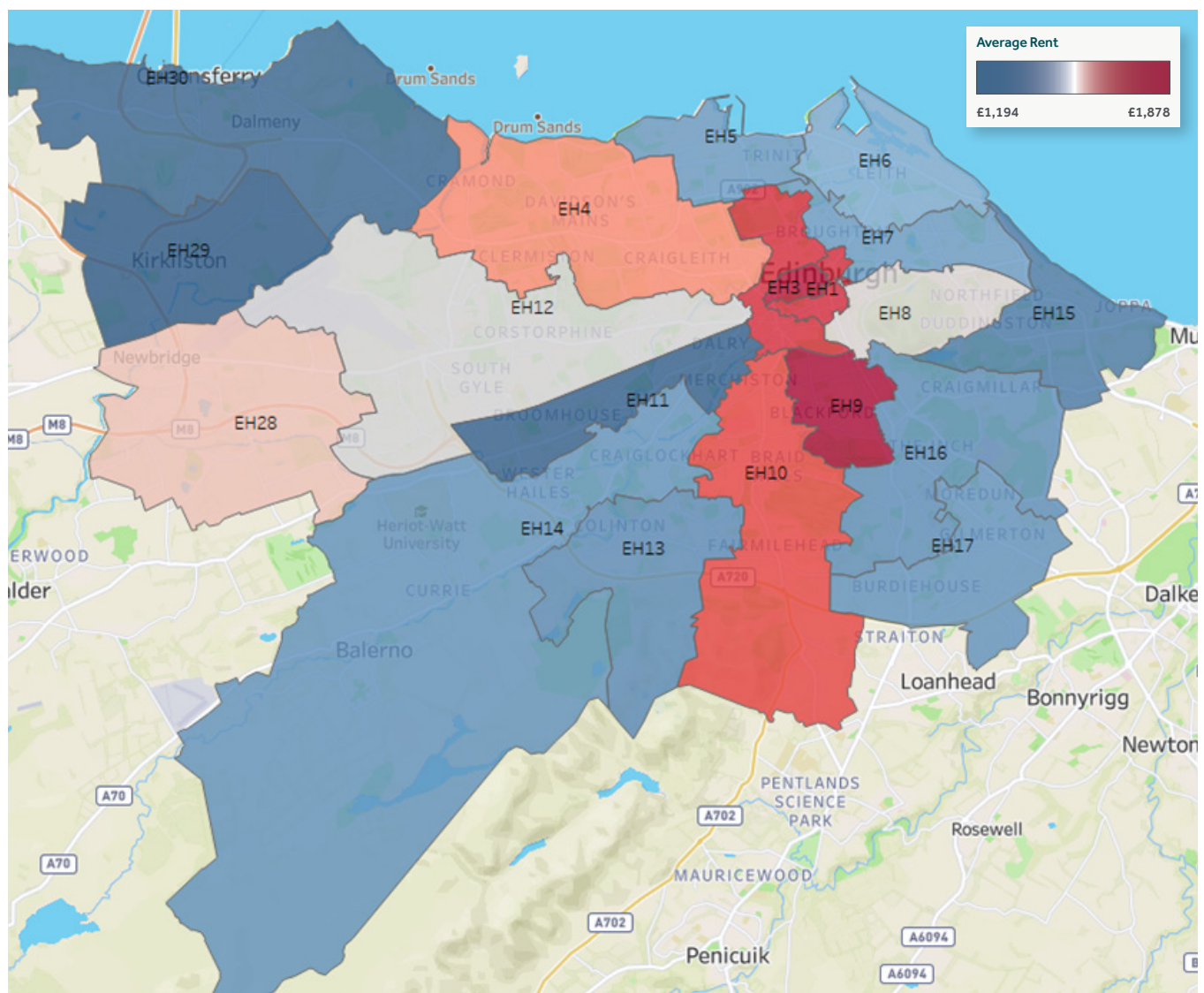
Key findings *explored.*

02. Average rents boast a significant premium of 20-25% on the city-wide average.

The average current rent in EH9 stands at £1,878 per month and is £1,745 per month in EH10. This compares to the city-wide average of £1,506 per month, indicating a premium of 25% (EH9) and 18% (EH10).

As well as the small City Centre districts of EH1, EH2 and EH3, Edinburgh South has among the highest average rents of any part of Edinburgh. This is due to the area's desirability for living as well as an ongoing demand/supply market imbalance that has seen rent rises significantly in the last 15 years.

Figure 4: Heat Map of Average Rents by Edinburgh Postcode District



Source: Rightmove

Key findings *explored.*

03. Rettie Maintain a Significant Market Share in Edinburgh South.

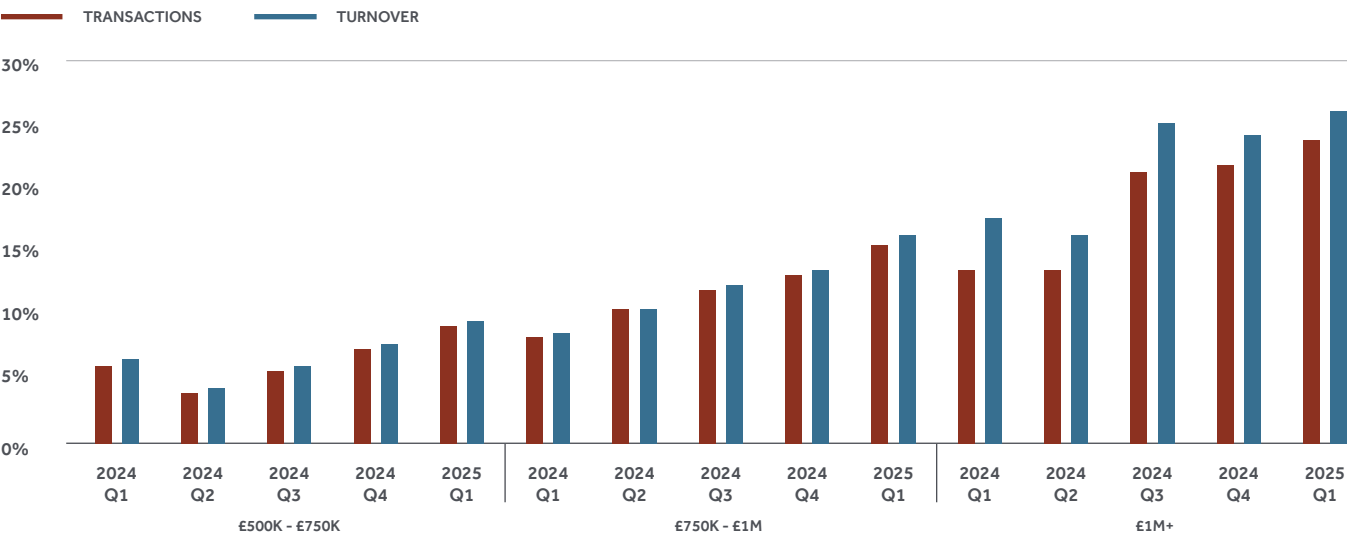
Rettie is one of the leading sales and rental agents in Edinburgh South.

In the sales market, we have a presence across the market, from sales under £200,000 to £1 million plus properties.

In the first quarter of 2025, we accounted for 15% of all transactions in Edinburgh South in the £750k-£1m market and a quarter of all transactions in the £1 million plus market.

Rettie have listed over £40 million worth of property in the area in the last 12 months above £400,000 (one-third of the total market size in the price band), which is a significantly higher share than any other agent.

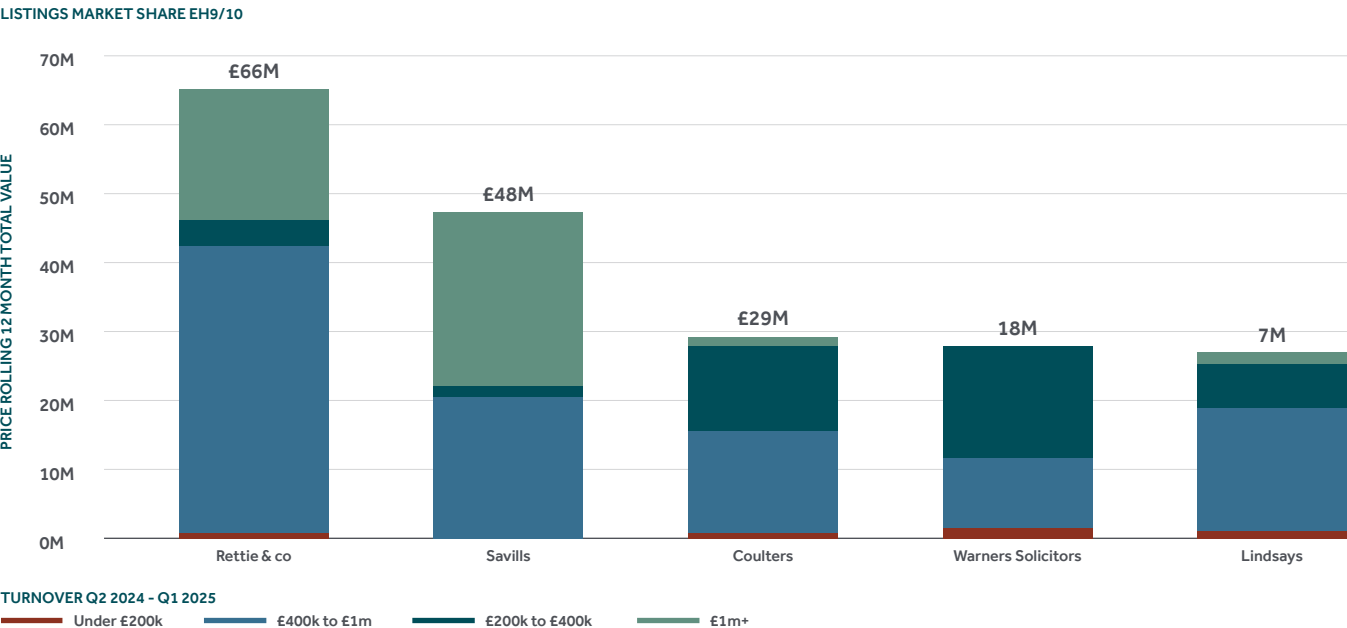
Figure 5: Rettie has a strong level of market share in Edinburgh South



Source: Crown Copyright Registers of Scotland and Rettie



Figure 6: Rettie is the market leader in Edinburgh South over £400k



Note: Refers to all listed sales on Rightmove between Q2 2024 and Q1 2025

Source: Rightmove

EH9 and EH10 Most Expensive Transaction (Last 12 months)

8 Nile Grove (Rettie) - £3,200,000





36 Dick Place

Edinburgh, EH9 2JB

OFFERS OVER £5,450,000

 **4 Reception**

 **5 Bedrooms**

 **4 Bathrooms**

A rare opportunity to acquire an exceptional B-listed Victorian villa, situated on one of Edinburgh's most enviable streets, and arguably one of the finest properties to come to market in The Grange. This distinguished family home comprises over 6,000 sq ft of refined living space, complemented by expansive landscaped gardens. With ample space for entertaining and everyday living, the property creates a truly exclusive and private sanctuary within the affluent Grange area.



MAX MILLS

Director, Residential Sales
0131 624 9045
max.mills@rettie.co.uk



JOHN WYBAR

Director, Residential Sales
0131 220 4160
john.wybar@rettie.co.uk

Introducing Rettie *Edinburgh South*: Your New Local Property Hub

We're thrilled to announce the opening of Rettie Edinburgh South, our brand-new branch in the heart of Edinburgh South. Offering expertise in Sales, Lettings and Financial Services, we're here to provide a seamless, comprehensive approach to your property needs.

At Rettie, we understand that property decisions are among the most significant financial commitments you'll make. That's why we've expanded with a new branch in Morningside - bringing our Sales, Lettings and Financial Services teams even closer to the community and ensuring a seamless and stress-free experience for all our clients.

As the leading agent for property sales in Edinburgh South, we know how sought-after this area is. Our Lettings service is an integral part of this offering, providing landlords with dedicated support, proactive communication, and flexible management options to maximise their investment. Alongside our property services, our Financial Services team helps clients secure the right mortgage and protection solutions. Whether you're a first-time buyer, refinancing, or investing in buy-to-let, we offer tailored advice on mortgages, re-mortgages, and insurance ensuring you get the right deal for your property journey.

At Rettie, we take pride in delivering a professional, efficient service with a commitment to achieving first-class results. If you're considering a move, exploring mortgage options, or want to know your property's value, contact us today for a free no obligation consultation.

Contact Us

Sales

0131 287 7200
edinburghsouthsales@rettie.co.uk

Lettings

0131 287 7300
edinburghsouthlettings@rettie.co.uk

Financial Services

0330 175 9977
financialservices@rettie.co.uk

Meet the Team



MAX MILLS

Director

Residential Sales



LAURA MATHIESON

Associate Director

Residential Sales



ROB TROTTER

Director of New Business

Lettings



CHRISTINE FALCONER

Business Development Manager

Lettings



BOB DUNCAN

Director

Financial Services