



CITY REGION DEAL

Edinburgh
& South East
Scotland

HOUSING MARKET AREA ASSESSMENT

2021

Introduction

A local housing system is generally the smallest unit for which it is appropriate to attempt to estimate, project or forecast demographic trends, including migration flows. This is because, at spatial levels below this, population movements will tend simply to reflect the availability of housing. The area defined as the functional Housing Market Areas (HMA) should therefore be considered the geography of the local housing market system, unless there are clear and specific reasons for thinking otherwise.

An HMA is a largely self-contained or independent area, where different elements and players (consumers, developers, etc.) are linked together by a variety of flows (property sale and purchase etc.). It is the combination of these flows and wider forces that influence the nature of the local housing system over time and spatially.

Housing supply targets and housing land requirements must be set for local authority areas and functioning housing market areas within council boundaries. The housing market areas identified by this assessment will be used to produce future housing need and demand estimates through the HNDA 3 project.

The housing market area assessment that informed HNDA2 recognised that the entire SESplan region operated as a functional housing market and as estimates of need and demand had to be produced for council areas, smaller housing market areas within council areas should be regarded as sub-market areas within the wider Edinburgh Housing Market area.

This assessment will examine whether:

- The entire SESplan region is still operating as a functional housing market area
- The extent of any sub-market areas operating within the wider HMA

Methodology

The methodology employed to examine the extents of the wider and sub HMAs is similar to that used in the previous study. Based upon data from the Registers of Scotland, house purchases made within the area over the last 4 years (1/1/2015 to 31/03/2019) were examined according to where the purchaser originated. As the purpose of the assessment is to look at the extent of the wider Edinburgh HMA and the sub areas operating within it, only purchases that originated within the wider area are considered. Purchases originating outwith the wider HMA are not considered as there is no scope to widen the area for which the HNDA will prepare future need and demand estimates. In total, nearly 70,000 house moves are included in the analysis.

Each local authority identified housing market areas operating within their council area. These were largely the same areas identified through the previous assessment with some minor alterations to follow natural boundaries based upon local knowledge. As the areas identified need to be defined within the HNDA tool to produce estimates of future housing need and demand, they must be aggregations of datazones. Datazones are the smallest area for which mid-year population estimates are available. The council nominated housing market areas are shown in Map 1 below.

Map 1. Council nominated HMAs

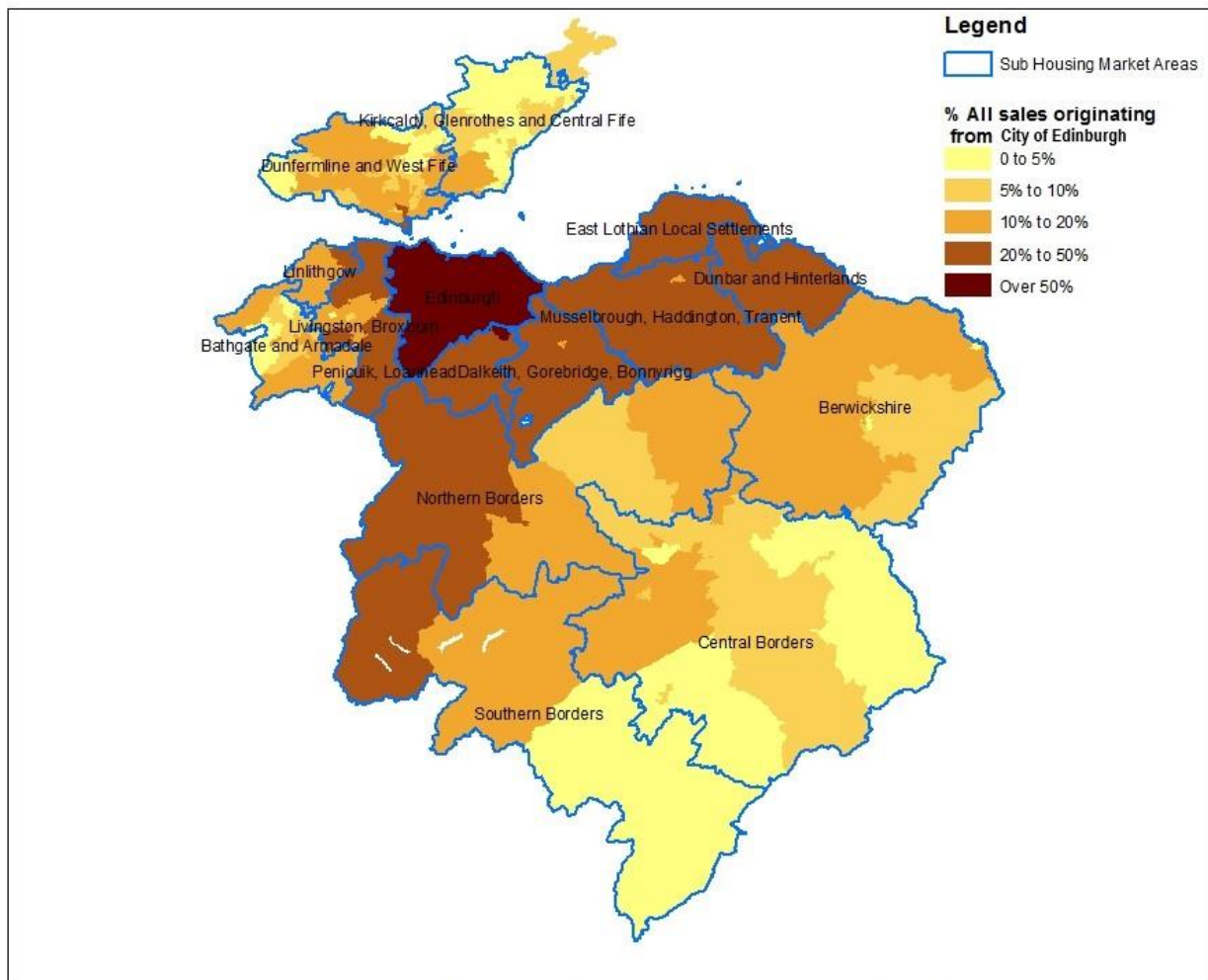


© Crown Copyright and database right 2021. All rights reserved. Ordnance Survey Licence number 100023420.

Extent of the Wider Edinburgh Housing Market Area

Whilst the majority of house sales made by Edinburgh purchasers were made within Edinburgh (90%), a significant number were made elsewhere within the Region. Just over 6,000 house sales within areas outwith Edinburgh were made by purchasers from Edinburgh. These purchases, Edinburgh's mobile demand, accounts for a significant proportion of all house sales within some areas. Areas where there are significant sales made to purchasers from Edinburgh can be considered part of the wider Edinburgh housing market area. Map 2 shows the extent to which Edinburgh's mobile demand is experienced within the wider area. The map is based upon intermediate geography zones, shaded according to the proportion of all house sales that were made by purchasers from the City of Edinburgh. Intermediate geography zones are aggregations of datazones.

Map 2: % of all house sales made by purchasers from the City of Edinburgh Council area



© Crown Copyright and database right 2021. All rights reserved. Ordnance Survey Licence number 100023420.

Table 1 below shows the number of sales in each of the sub-market areas made to purchasers from Edinburgh. The table also shows the % of all sales in the area that were made by Edinburgh purchasers and the number and proportion of sales in Edinburgh to purchasers from each sub-HMAA.

Table 1: Sales and purchases in/from Edinburgh

	Sales to Purchasers from Edinburgh	% All purchases in area	Sales in Edinburgh to purchasers from other areas	% All sales to purchasers from Area
Edinburgh	29,115	89.7	29,115	
Musselburgh / Haddington /Tranent etc.	1,332	30.3	508	14.3
East Lothian Coastal settlements	316	30.4	204	20.8
Dunbar and Hinterland	216	21.7	83	10.6
Dunfermline and West Fife	938	11.4	418	5.5
Kirkcaldy, Glenrothes & Central Fife	318	4.3	215	3.0
Dalkeith / Gorebridge / Bonnyrigg	956	33.7	447	18.9
Penicuik / Loanhead	383	37.7	242	25.4
Central Borders	153	6.4	178	7.5
Berwickshire	61	8.9	98	13.1
Northern Borders (Peebles etc.)	221	20.1	243	21.3
Southern Borders	4	8.0	0	0.0
Livingston / Broxburn	832	23.1	423	11.9
Bathgate and Armadale	224	8.3	158	6.8
Linlithgow	86	16.2	109	17.1
Total	35,155		32,441	

Table 1 and Map 2 demonstrate that purchasers from Edinburgh have the most influence on house sales in East Lothian, Midlothian, Eastern West Lothian and the Northern Borders. House sales in Central Fife and the Southern Borders are influenced the least by purchasers from Edinburgh.

In terms of sale in Edinburgh to purchasers from elsewhere, the link is strongest between Edinburgh and Penicuik/Loanhead, Northern Borders and East Lothian Coastal Settlements. Purchasers from Fife, Central and Southern Borders and Bathgate/Armadale are less likely to buy in Edinburgh.

Local Authority area analysis

Table 2 below shows the matrix of sales in each local authority area in terms of the proportion of all purchases originating **from** the area. Table 3 shows the matrix according to the proportion of all sales made **in** the area. Purchases in and from Fife only relate to the Central and Western Fife Housing Market areas (the parts of Fife within the SESplan area).

Table 2. House purchasers by area of house purchased

	Destination						
	City of Edinburgh	East Lothian	Fife (West & Central)	Midlothian	Scottish Borders	West Lothian	All Moves
Origin							
City of Edinburgh	82.8	5.3	3.6	3.8	1.2	3.2	100
East Lothian	15.0	76.6	1.2	3.9	2.6	0.8	100
Fife (West & Central)	4.3	0.3	94.5	0.2	0.2	0.6	100
Midlothian	20.7	7.0	3.2	63.3	4.1	1.7	100
Scottish Borders	12.1	3.2	0.7	3.0	80.4	0.6	100
West Lothian	10.6	1.2	2.7	0.7	0.6	84.3	100

In terms of the origin of purchaser of houses in each council area, Fife (West & Central) had the greatest level of self-containment with 95% of sales being made to someone from elsewhere in Fife (West & Central). Midlothian had the lowest level of self-containment due to very high number of purchasers buying in Edinburgh.

Table 3. House sales in council area by area of purchaser

	Destination					
	City of Edinburgh	East Lothian	Fife (West & Central)	Midlothian	Scottish Borders	West Lothian
Origin						
City of Edinburgh	89.7	29.0	8.0	34.8	10.4	16.7
East Lothian	2.5	63.3	0.4	5.3	3.3	0.6
Fife (West & Central)	2.0	0.7	89.6	0.8	0.6	1.2
Midlothian	2.1	3.6	0.7	54.7	3.2	0.8
Scottish Borders	1.6	2.1	0.2	3.3	81.6	0.4
West Lothian	2.1	1.2	1.1	1.1	0.9	80.3
All moves	100	100	100	100	100	100

In terms of the area of house sale, Edinburgh had the highest level of self-containment with 90% of house sales in Edinburgh made by purchasers from the City. Midlothian again had the lowest self-containment at 54% with 35% of sales to Edinburgh purchasers.

Sub Housing Market Area analysis East Lothian



Musselburgh, Haddington, Tranent etc.

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	508	14.3	1,332	30.3	
Musselburgh / Haddington /Tranent etc.	2,508	70.6	2,508	57.1	82.0
East Lothian Coastal settlements	98	2.8	163	3.7	5.3
Dunbar and Hinterland	83	2.3	64	1.5	2.1
Dunfermline and West Fife	30	0.8	26	0.6	0.9
Kirkcaldy, Glenrothes & Central Fife	23	0.6	9	0.2	0.3
Dalkeith / Gorebridge / Bonnyrigg	146	4.1	142	3.2	4.6
Penicuik / Loanhead	28	0.8	29	0.7	0.9
Central Borders	29	0.8	25	0.6	0.8
Berwickshire	35	1.0	24	0.5	0.8
Northern Borders (Peebles etc.)	24	0.7	23	0.5	0.8
Southern Borders	0	0.0	1	0.0	0.0
Livingston / Broxburn	27	0.8	30	0.7	1.0
Bathgate and Armadale	8	0.2	13	0.3	0.4
Linlithgow	3	0.1	1	0.0	0.0
Total purchases/sales	3,550		4,390		

The Musselburgh, Haddington, Tranent Sub-HMA has a high level of self-containment with 70% of all purchasers from the HMA buying elsewhere within the same area. In terms of sales made in the HMA, there is a strong link to the City with over 30% of sales in the area being made by purchasers from Edinburgh. Excluding Edinburgh purchasers, 82% of the remaining sales were made to purchasers from within the area.

East Lothian Coastal Settlements

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	204	20.8	316	30.4	
Musselburgh / Haddington /Tranent etc.	163	16.6	98	9.4	13.5
East Lothian Coastal settlements	514	52.3	514	49.4	70.9
Dunbar and Hinterland	62	6.3	31	3.0	4.3
Dunfermline and West Fife	4	0.4	6	0.6	0.8
Kirkcaldy, Glenrothes & Central Fife	2	0.2		0.0	0.0
Dalkeith / Gorebridge / Bonnyrigg	12	1.2	34	3.3	4.7
Penicuik / Loanhead	3	0.3	6	0.6	0.8
Central Borders	6	0.6	11	1.1	1.5
Berwickshire	5	0.5	3	0.3	0.4
Northern Borders (Peebles etc.)	6	0.6	5	0.5	0.7
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	2	0.2	11	1.1	1.5
Bathgate and Armadale		0.0	2	0.2	0.3
Linlithgow		0.0	4	0.4	0.6
Total purchases/sales	983		1,041		

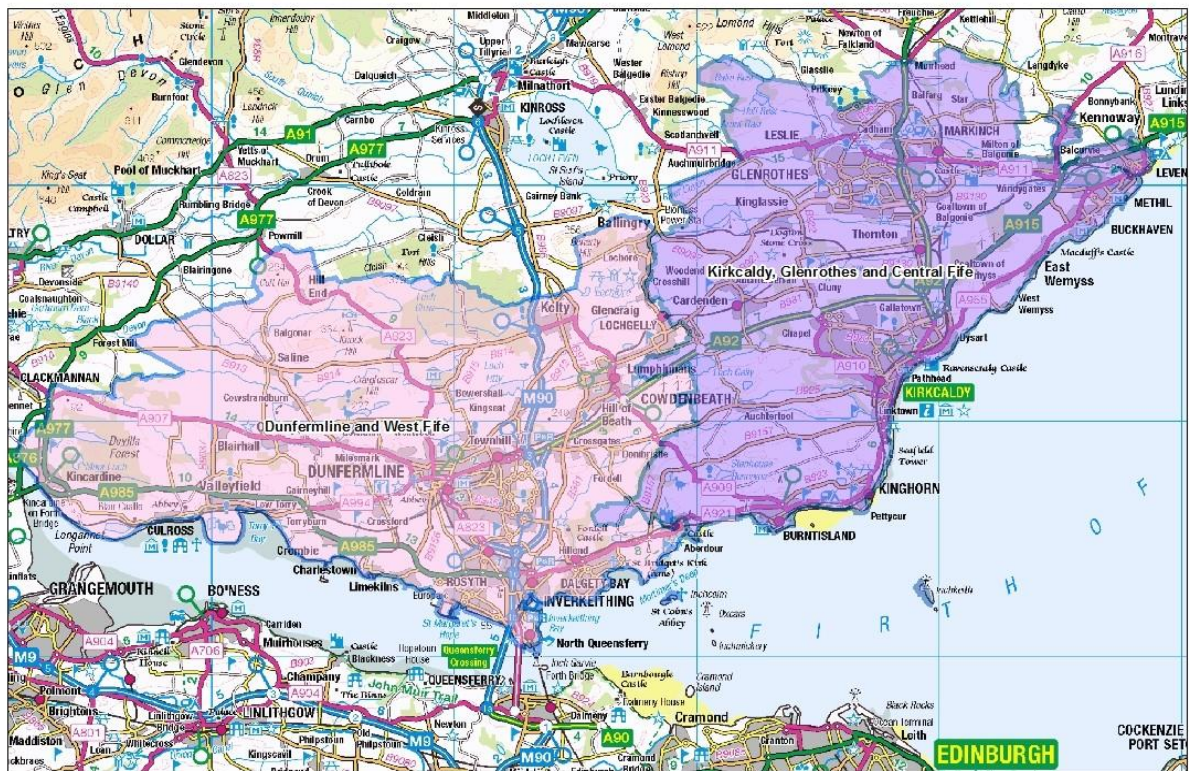
East Lothian coastal settlements has a reasonable level of self-containment though lower than Musselburgh, Haddington and Tranent. 52% of purchasers from the HMA bought within the same area whilst 49% of all sales within the area were to internal purchasers. East Lothian coastal settlements has a strong relationship with Edinburgh both as a destination and an origin with over 21% of purchasers from the area buying within the City and 30% of sales in the area being made by Edinburgh purchasers. Excluding Edinburgh purchasers, 71% of the remaining sales were made to internal buyers.

Dunbar and Hinterlands

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	83	10.6	216	21.7	
Musselburgh / Haddington /Tranent etc.	64	8.2	83	8.3	10.7
East Lothian Coastal settlements	31	4.0	62	6.2	8.0
Dunbar and Hinterland	546	69.8	546	54.9	70.1
Dunfermline and West Fife	4	0.5	2	0.2	0.3
Kirkcaldy, Glenrothes & Central Fife	2	0.3	1	0.1	0.1
Dalkeith / Gorebridge / Bonnyrigg	13	1.7	18	1.8	2.3
Penicuik / Loanhead	3	0.4	5	0.5	0.6
Central Borders	7	0.9	5	0.5	0.6
Berwickshire	24	3.1	28	2.8	3.6
Northern Borders (Peebles etc.)	3	0.4	12	1.2	1.5
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	2	0.3	12	1.2	1.5
Bathgate and Armadale		0.0	3	0.3	0.4
Linlithgow		0.0	2	0.2	0.3
Total purchases/sales	782		995		

Dunbar and Hinterlands also has strong self-containment with strong links to Edinburgh. 70% of all purchasers bought within the same area, 11% purchased in Edinburgh and 8% purchased in Musselburgh, Haddington and Tranent. 22% of sales in the area were to Edinburgh purchasers and excluding these sales, 70% were from elsewhere in the area.

Fife (West & Central)



Dunfermline and West Fife

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	418	5.5	938	11.4	
Musselburgh / Haddington /Tranent etc.	26	0.3	30	0.4	0.4
East Lothian Coastal settlements	6	0.1	4	0.0	0.1
Dunbar and Hinterland	2	0.0	4	0.0	0.1
Dunfermline and West Fife	6,614	86.9	6,614	80.1	90.4
Kirkcaldy, Glenrothes & Central Fife	437	5.7	472	5.7	6.4
Dalkeith / Gorebridge / Bonnyrigg	19	0.2	51	0.6	0.7
Penicuik / Loanhead	4	0.1	22	0.3	0.3
Central Borders	7	0.1	2	0.0	0.0
Berwickshire	7	0.1	6	0.1	0.1
Northern Borders (Peebles etc.)	10	0.1	7	0.1	0.1
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	25	0.3	58	0.7	0.8
Bathgate and Armadale	26	0.3	35	0.4	0.5
Linlithgow	9	0.1	14	0.2	0.2
Total purchases/sales	7,610		8,257		

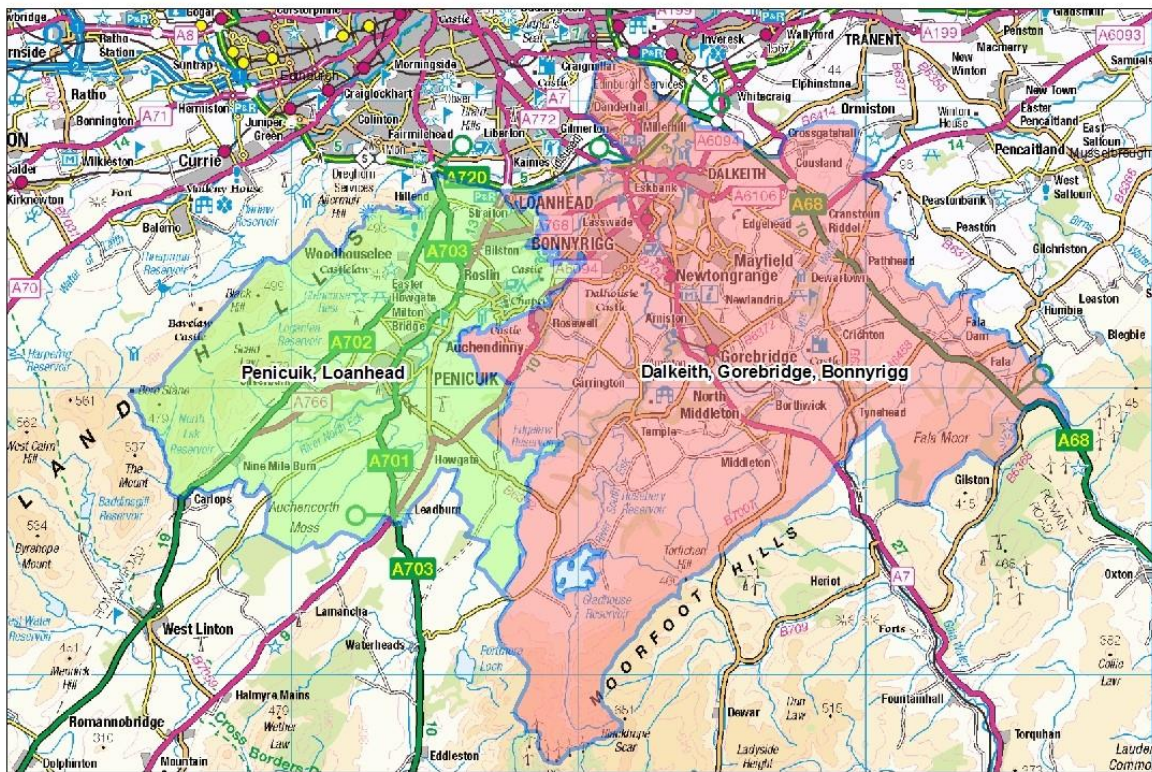
Dunfermline and West Fife has very high self-containment, especially in terms of where people from the area chose to purchase. 87% purchased internally, with 6% buying in Edinburgh. 80% of sales within the area were made to internal purchasers with 11% made to Edinburgh purchasers. Excluding Edinburgh purchasers, over 90% of the sales in the area were internal with a further 6% from purchasers from adjacent Kirkcaldy, Glenrothes and Central Fife area.

Kirkcaldy, Glenrothes and Central Fife

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	215	3.0	318	4.3	
Musselburgh / Haddington /Tranent etc.	9	0.1	23	0.3	0.3
East Lothian Coastal settlements	0	0.0	2	0.0	0.0
Dunbar and Hinterland	1	0.0	2	0.0	0.0
Dunfermline and West Fife	472	6.6	437	5.9	6.2
Kirkcaldy, Glenrothes & Central Fife	6,467	89.9	6,467	87.8	91.8
Dalkeith / Gorebridge / Bonnyrigg	5	0.1	17	0.2	0.2
Penicuik / Loanhead	1	0.0	15	0.2	0.2
Central Borders	2	0.0	5	0.1	0.1
Berwickshire	0	0.0	5	0.1	0.1
Northern Borders (Peebles etc.)	1	0.0	3	0.0	0.0
Southern Borders	0	0.0		0.0	0.0
Livingston / Broxburn	10	0.1	36	0.5	0.5
Bathgate and Armadale	12	0.2	31	0.4	0.4
Linlithgow	1	0.0	4	0.1	0.1
Total purchases/sales	7,196		7,365		

Kirkcaldy, Glenrothes and Central Fife area has a very high level of self-containment with 90% of all purchasers from the area buying internally and 88% of all sales in the area also being internal. With only 4% of sales in the area made to Edinburgh purchasers, Kirkcaldy, Glenrothes and Central Fife is the area with the weakest relationship to the wider Edinburgh Housing Market area. However, with 320 sales to Edinburgh purchasers, the volume from Edinburgh is higher than several other sub-HMAs where the proportion of sales to Edinburgh purchasers is higher.

Midlothian



© Crown Copyright and database right 2021. All rights reserved. Ordnance Survey Licence number 100023420.

Dalkeith / Gorebridge / Bonnyrigg

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	447	18.9	956	33.7	
Musselburgh / Haddington /Tranent etc.	142	6.0	146	5.1	7.8
East Lothian Coastal settlements	34	1.4	12	0.4	0.6
Dunbar and Hinterland	18	0.8	13	0.5	0.7
Dunfermline and West Fife	51	2.2	19	0.7	1.0
Kirkcaldy, Glenrothes & Central Fife	17	0.7	5	0.2	0.3
Dalkeith / Gorebridge / Bonnyrigg	1,467	61.9	1,467	51.7	78.0
Penicuik / Loanhead	75	3.2	128	4.5	6.8
Central Borders	30	1.3	18	0.6	1.0
Berwickshire	8	0.3	8	0.3	0.4
Northern Borders (Peebles etc.)	45	1.9	32	1.1	1.7
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	25	1.1	18	0.6	1.0
Bathgate and Armadale	10	0.4	10	0.4	0.5
Linlithgow	1	0.0	4	0.1	0.2
Total purchases/sales	2,370		2,836		

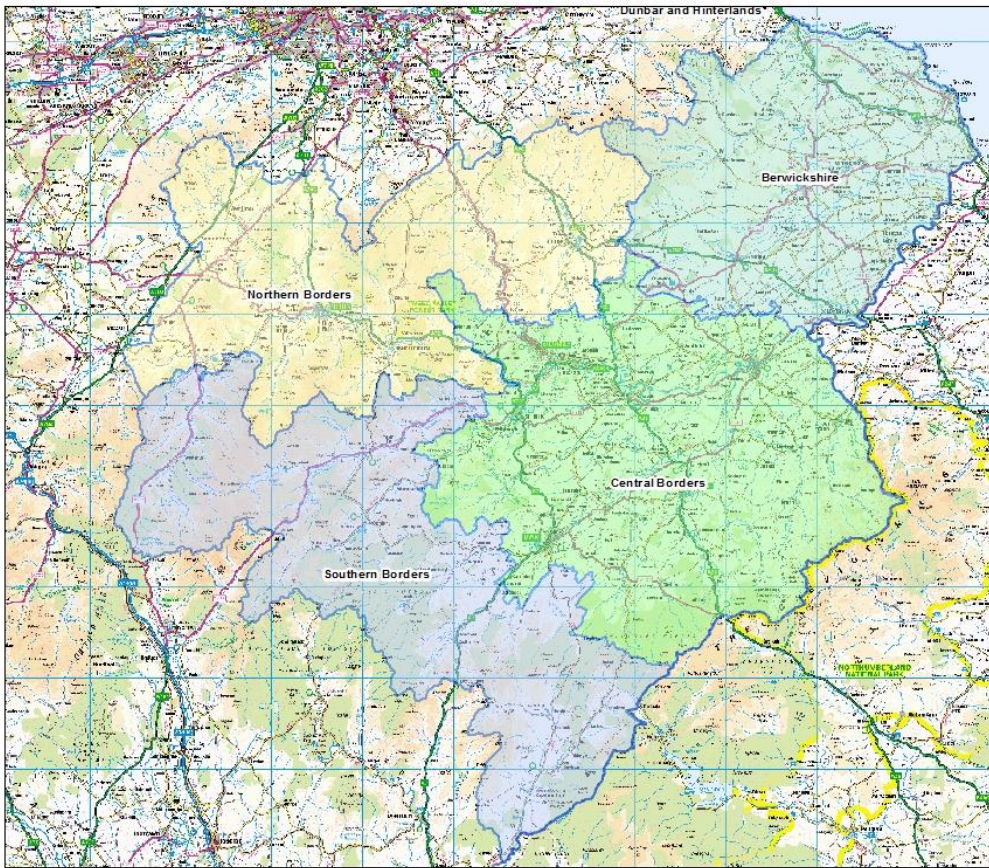
Dalkeith, Gorebridge and Bonnyrigg has a reasonable level of self-containment but has very strong links with Edinburgh, both as a destination for house purchasers from the City and in terms of a place where purchasers buy. 19% of all purchasers from the area bought in Edinburgh whilst 62% purchased within the HMA. 52% of all sales within the zone were to internal purchasers with 34% to Edinburgh buyers. Ignoring Edinburgh purchasers, 78% of the remaining sales were internal.

Penicuik/Loanhead

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	242	25.4	383	37.7	
Musselburgh / Haddington /Tranent etc.	29	3.0	28	2.8	4.4
East Lothian Coastal settlements	6	0.6	3	0.3	0.5
Dunbar and Hinterland	5	0.5	3	0.3	0.5
Dunfermline and West Fife	22	2.3	4	0.4	0.6
Kirkcaldy, Glenrothes & Central Fife	15	1.6	1	0.1	0.2
Dalkeith / Gorebridge / Bonnyrigg	128	13.4	75	7.4	11.9
Penicuik / Loanhead	435	45.6	435	42.9	68.8
Central Borders	6	0.6	6	0.6	0.9
Berwickshire	2	0.2	1	0.1	0.2
Northern Borders (Peebles etc.)	44	4.6	64	6.3	10.1
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	8	0.8	8	0.8	1.3
Bathgate and Armadale	9	0.9	4	0.4	0.6
Linlithgow	2	0.2		0.0	0.0
Total purchases/sales	953		1,015		

The level of self-containment of the area is reasonable though, as with Dalkeith, Gorebridge and Bonnyrigg, self-containment is much higher when purchases in and from the City are discounted. 46% of all purchasers from the area bought within the HMA with 25% purchasing in Edinburgh. In terms of the proportion of sales within the area, 43% were internal and 38% were made to Edinburgh purchasers. When purchasers from Edinburgh are discounted, 69% of sales in the area were internal purchases. There is also a strong link with the Dalkeith, Gorebridge and Bonnyrigg HMA with 13% of all sales in Penicuik/Loanhead to purchasers from the HMA.

Scottish Borders



© Crown Copyright and database right 2021. All rights reserved. Ordnance Survey Licence number 100023420.

Central Borders

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	178	7.5	153	6.4	
Musselburgh / Haddington /Tranent etc.	25	1.1	29	1.2	1.3
East Lothian Coastal settlements	11	0.5	6	0.3	0.3
Dunbar and Hinterland	5	0.2	7	0.3	0.3
Dunfermline and West Fife	2	0.1	7	0.3	0.3
Kirkcaldy, Glenrothes & Central Fife	5	0.2	2	0.1	0.1
Dalkeith / Gorebridge / Bonnyrigg	18	0.8	30	1.3	1.3
Penicuik / Loanhead	6	0.3	6	0.3	0.3
Central Borders	1,949	82.4	1,949	81.8	87.4
Berwickshire	38	1.6	67	2.8	3.0
Northern Borders (Peebles etc.)	93	3.9	106	4.5	4.8
Southern Borders	24	1.0	4	0.2	0.2
Livingston / Broxburn	6	0.3	9	0.4	0.4
Bathgate and Armadale	3	0.1	5	0.2	0.2
Linlithgow	1	0.0	2	0.1	0.1
Total purchases/sales	2,364		2,382		

Central Borders area has a high level of self-containment with 82% of all purchasers from the area buying elsewhere in the area and 82% of all sales in the area being to purchasers from the same area. 6% of all sales in the area were to purchasers from Edinburgh. There are also ties to the Northern Borders with purchasers from this locality accounting for 4.5% of sales within Central Borders.

Berwickshire

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	98	13.1	61	8.9	
Musselburgh / Haddington /Tranent etc.	24	3.2	35	5.1	5.6
East Lothian Coastal settlements	3	0.4	5	0.7	0.8
Dunbar and Hinterland	28	3.7	24	3.5	3.8
Dunfermline and West Fife	6	0.8	7	1.0	1.1
Kirkcaldy, Glenrothes & Central Fife	5	0.7	0	0.0	0.0
Dalkeith / Gorebridge / Bonnyrigg	8	1.1	8	1.2	1.3
Penicuik / Loanhead	1	0.1	2	0.3	0.3
Central Borders	67	8.9	38	5.5	6.1
Berwickshire	492	65.7	492	71.8	78.8
Northern Borders (Peebles etc.)	13	1.7	8	1.2	1.3
Southern Borders	1	0.1	0	0.0	0.0
Livingston / Broxburn	2	0.3	4	0.6	0.6
Bathgate and Armadale	1	0.1	1	0.1	0.2
Linlithgow		0.0		0.0	0.0
Total purchases/sales	749		685		

Berwickshire has high level of self-containment. 66% of all purchasers from the area bought elsewhere in the HMA and 72% of all sales in the area being to purchasers from elsewhere in same HMA. 9% of sales in the area were to Edinburgh purchasers and 13% of all purchasers from the area bought in Edinburgh. Berwickshire also has strong ties with neighbouring East Lothian (10.3% of sales in the area being made to East Lothian purchasers) and Central Borders (accounting for 5.5% of all sales).

Northern Borders

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	243	21.3	221	20.1	
Musselburgh / Haddington /Tranent etc.	23	2.0	24	2.2	2.7
East Lothian Coastal settlements	5	0.4	6	0.5	0.7
Dunbar and Hinterland	12	1.1	3	0.3	0.3
Dunfermline and West Fife	7	0.6	10	0.9	1.1
Kirkcaldy, Glenrothes & Central Fife	3	0.3	1	0.1	0.1
Dalkeith / Gorebridge / Bonnyrigg	32	2.8	45	4.1	5.1
Penicuik / Loanhead	64	5.6	44	4.0	5.0
Central Borders	106	9.3	93	8.5	10.6
Berwickshire	8	0.7	13	1.2	1.5
Northern Borders (Peebles etc.)	622	54.5	622	56.7	71.0
Southern Borders	5	0.4		0.0	0.0
Livingston / Broxburn	7	0.6	8	0.7	0.9
Bathgate and Armadale	3	0.3	3	0.3	0.3
Linlithgow	1	0.1	4	0.4	0.5
Total purchases/sales	1,141		1,097		

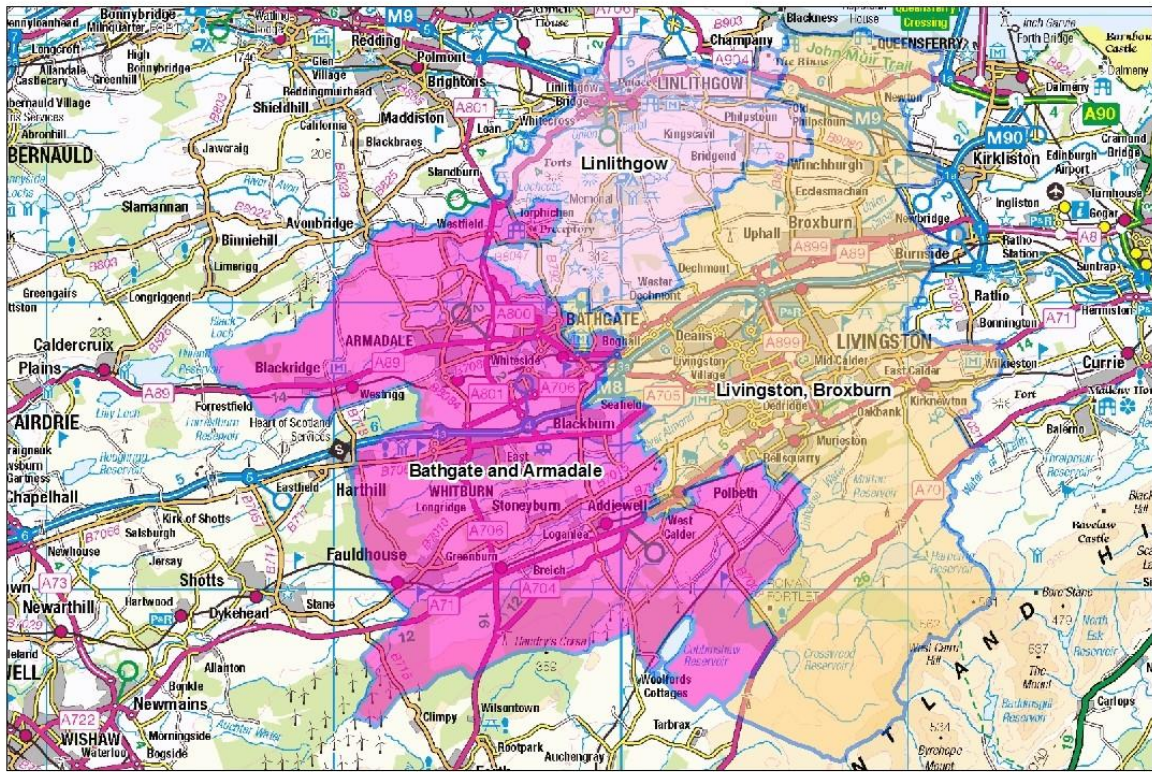
Northern Borders is the sub-market area in Scottish Borders Council area with the strongest links to Edinburgh with significant numbers of sales and purchases occurring in both directions. 21% of purchasers from Northern Borders bought in Edinburgh and 20% of sales in the area were to Edinburgh purchasers. 57% of all sales in the area were to purchasers from within the area and this increases to 71% when purchasers from Edinburgh are excluded.

Southern Borders

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	0	0.0	4	8.0	
Musselburgh / Haddington /Tranent etc.	1	4.8	0	0.0	0.0
East Lothian Coastal settlements	0	0.0	0	0.0	0.0
Dunbar and Hinterland	0	0.0	0	0.0	0.0
Dunfermline and West Fife	0	0.0	0	0.0	0.0
Kirkcaldy, Glenrothes & Central Fife	0	0.0	0	0.0	0.0
Dalkeith / Gorebridge / Bonnyrigg	0	0.0	0	0.0	0.0
Penicuik / Loanhead	0	0.0	0	0.0	0.0
Central Borders	4	19.0	24	48.0	52.2
Berwickshire	0	0.0	1	2.0	2.2
Northern Borders (Peebles etc.)	0	0.0	5	10.0	10.9
Southern Borders	16	76.2	16	32.0	34.8
Livingston / Broxburn	0	0.0	0	0.0	0.0
Bathgate and Armadale	0	0.0	0	0.0	0.0
Linlithgow	0	0.0	0	0.0	0.0
Total purchases/sales	21		50		

There were very few house sales in the area (21) or purchasers made from Southern Borders purchasers (50). There are strong ties with Central Borders which accounts for 19% of purchasers from Southern Borders and 48% of sales within Southern Borders are to purchasers from Central Borders.

West Lothian



© Crown Copyright and database right 2021. All rights reserved. Ordnance Survey Licence number 100023420.

Livingston/Broxburn

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	423	11.9	832	23.1	
Musselburgh / Haddington /Tranent etc.	30	0.8	27	0.7	1.0
East Lothian Coastal settlements	11	0.3	2	0.1	0.1
Dunbar and Hinterland	12	0.3	2	0.1	0.1
Dunfermline and West Fife	58	1.6	25	0.7	0.9
Kirkcaldy, Glenrothes & Central Fife	36	1.0	10	0.3	0.4
Dalkeith / Gorebridge / Bonnyrigg	18	0.5	25	0.7	0.9
Penicuik / Loanhead	8	0.2	8	0.2	0.3
Central Borders	9	0.3	6	0.2	0.2
Berwickshire	4	0.1	2	0.1	0.1
Northern Borders (Peebles etc.)	8	0.2	7	0.2	0.3
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	2,370	66.9	2,370	65.7	85.4
Bathgate and Armadale	518	14.6	220	6.1	7.9
Linlithgow	38	1.1	71	2.0	2.6
Total purchases/sales	3,543		3,607		

The Livingston/Broxburn sub-market area has a strong relationship with the wider Edinburgh Housing Market area. 23% of all sales in the area were to purchasers from Edinburgh. Excluding these sales, 85% of sales were to purchasers from elsewhere in the area. There is also a significant number of purchasers from the area buying in Edinburgh – 12% of all purchasers from the zone bought in Edinburgh.

Bathgate and Armadale

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	158	6.8	224	8.3	
Musselburgh / Haddington /Tranent etc.	13	0.6	8	0.3	0.3
East Lothian Coastal settlements	2	0.1		0.0	0.0
Dunbar and Hinterland	3	0.1		0.0	0.0
Dunfermline and West Fife	35	1.5	26	1.0	1.0
Kirkcaldy, Glenrothes & Central Fife	31	1.3	12	0.4	0.5
Dalkeith / Gorebridge / Bonnyrigg	10	0.4	10	0.4	0.4
Penicuik / Loanhead	4	0.2	9	0.3	0.4
Central Borders	5	0.2	3	0.1	0.1
Berwickshire	1	0.0	1	0.0	0.0
Northern Borders (Peebles etc.)	3	0.1	3	0.1	0.1
Southern Borders		0.0		0.0	0.0
Livingston / Broxburn	220	9.4	518	19.2	20.9
Bathgate and Armadale	1,830	78.2	1,830	67.7	73.8
Linlithgow	25	1.1	60	2.2	2.4
Total purchases/sales	2,340		2,704		

Bathgate and Armadale's relationship with the wider Edinburgh HMA is not as strong as Livingston/Broxburn. 8% of sales in the area were to purchasers from Edinburgh. Excluding these sales, 74% of sales were to purchasers from elsewhere within the area. There is a strong link between Livingston/Broxburn and Bathgate and Armadale areas with 19% of all sales in Bathgate and Armadale made by purchasers from Livingston/Broxburn.

Linlithgow

Sub-HMA	Purchases by area of sale	% All Purchases	Sales in area by origin of purchaser	% All sales in HMA	% <i>Excluding Edinburgh</i>
Edinburgh	109	17.1	86	16.2	
Musselburgh / Haddington /Tranent etc.	1	0.2	3	0.6	0.7
East Lothian Coastal settlements	4	0.6	0	0.0	0.0
Dunbar and Hinterland	2	0.3	0	0.0	0.0
Dunfermline and West Fife	14	2.2	9	1.7	2.0
Kirkcaldy, Glenrothes & Central Fife	4	0.6	1	0.2	0.2
Dalkeith / Gorebridge / Bonnyrigg	4	0.6	1	0.2	0.2
Penicuik / Loanhead		0.0	2	0.4	0.4
Central Borders	2	0.3	1	0.2	0.2
Berwickshire	0	0.0	0	0.0	0.0
Northern Borders (Peebles etc.)	4	0.6	1	0.2	0.2
Southern Borders	0	0.0		0.0	0.0
Livingston / Broxburn	71	11.1	38	7.2	8.5
Bathgate and Armadale	60	9.4	25	4.7	5.6
Linlithgow	364	57.0	364	68.5	81.8
Total purchases/sales	639		531		

Linlithgow has a reasonably strong relationship with the wider Edinburgh HMA with significant flows in both directions. 16% of sales in the area were made by purchasers from Edinburgh and 17% of purchasers from the area bought in Edinburgh. Excluding Edinburgh purchasers, the level of self-containment is high with 82% of sales in the area being made by purchasers from elsewhere within the area.

Conclusion

Wider Edinburgh Housing Market Area

The evidence shows that the whole of the South East Scotland City Region is operating as a functional housing market area though it should be recognised that the areas furthest from the city have a weaker relationship with Edinburgh than those that are closer. Kirkcaldy, Glenrothes and South East Fife, Central Borders, Southern Borders and Bathgate and Armadale areas have fewer sales, proportionally, to Edinburgh purchasers than the other areas.

Sub-Market Areas

The whole of the South East Scotland Region is operating as functional housing market with a significant number of sales/purchases in and from Edinburgh occurring for each sub area. Other sales largely occurred within the sub-market areas with each of the sub-market areas demonstrating high levels of self-containment. The exception is Southern Borders which showed a lower level of self-containment, though the number of moves to and from this area was low.

Implications for HNDA3

HNDA3 is required to produce estimates of future housing need and demand for Council areas and functional housing market areas. As the wider Edinburgh Housing market area extends well beyond the single local authority boundary, there is no requirement to produce estimates for the sub-market areas identified. However, it may be useful to do so to help inform local decision making and this will be progressed within local housing strategies and local development plans.