

ZOOPLA

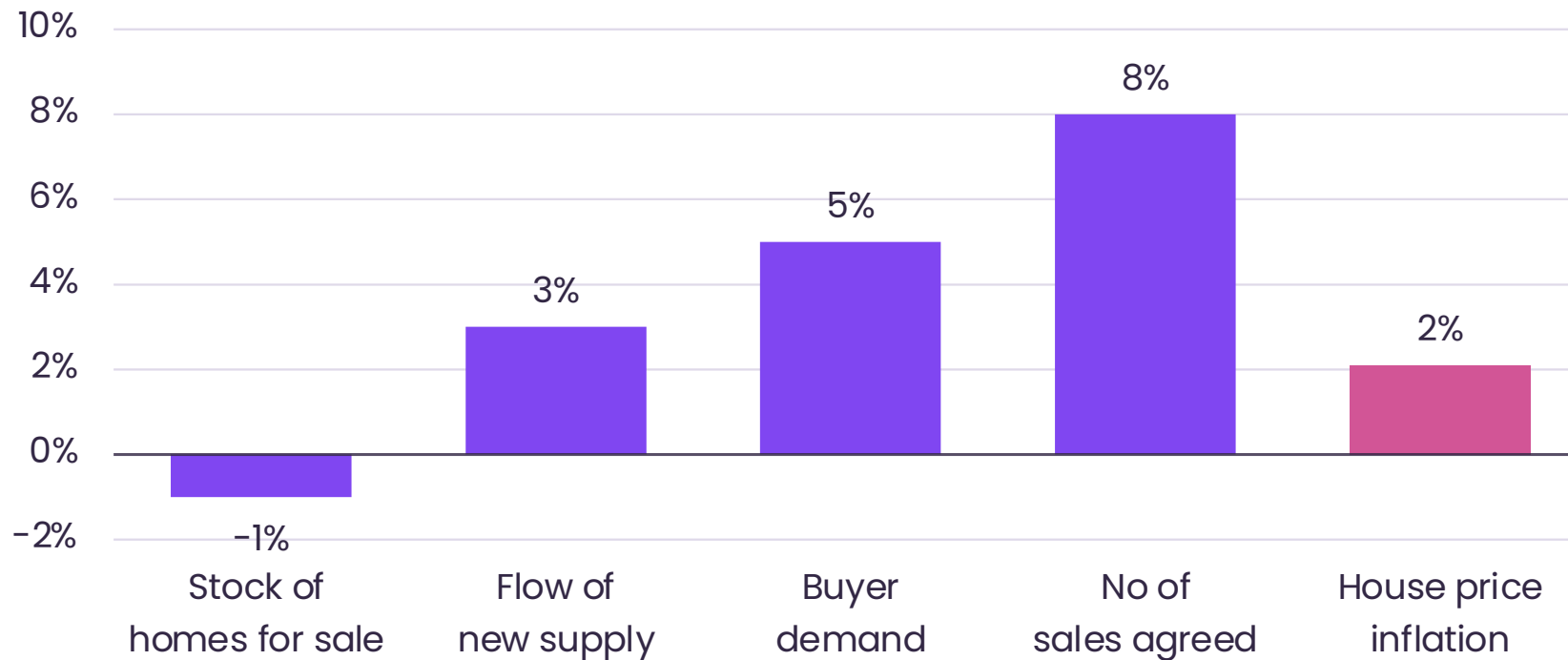
Unlocking buyer demand for new homes in Scotland

Richard Donnell – Executive Director

24 September 2025

Scottish housing – demand up, sales up, tight supply

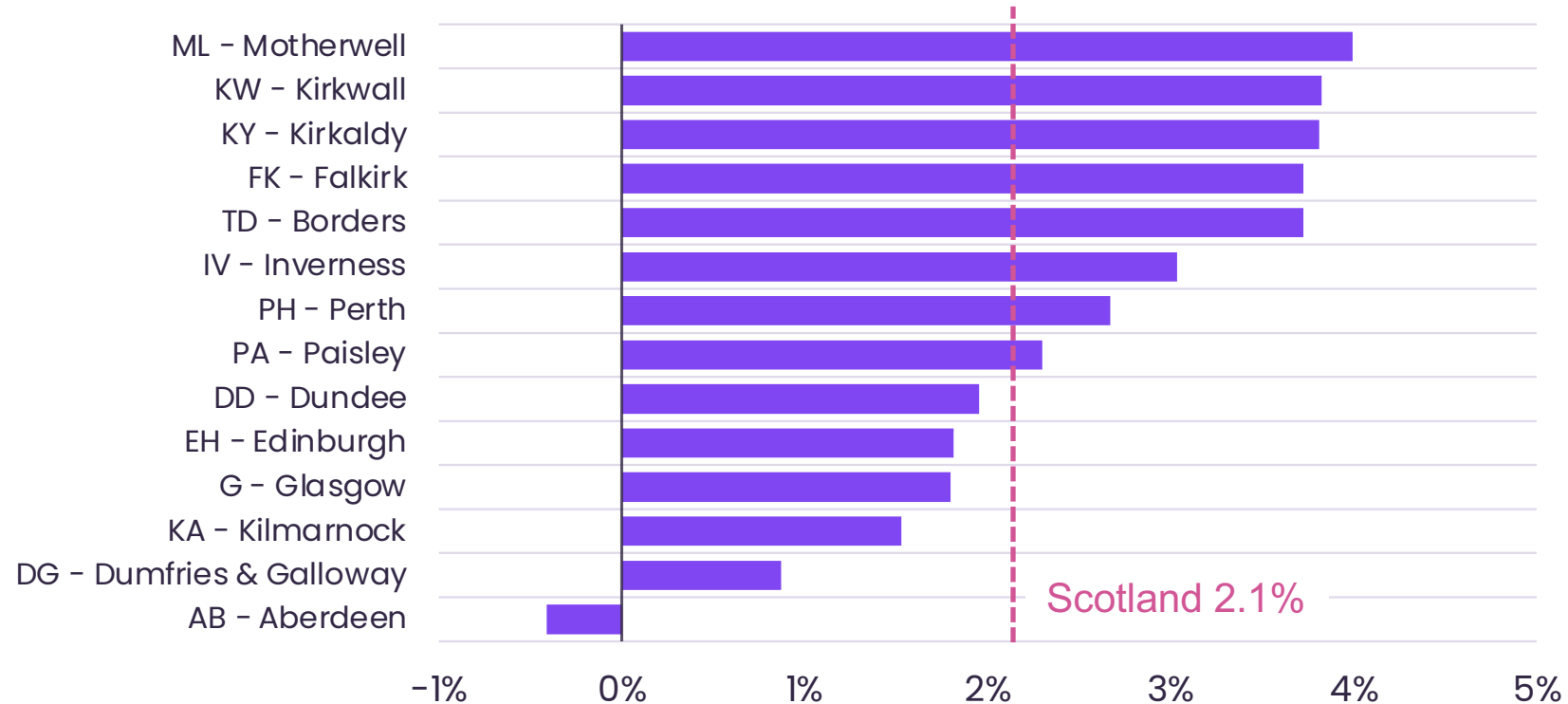
UK housing sales market metrics % year on year [to 30 June 2025]



Source: Zoopla Research – rolling 28 day average to 4 September 2025 compared to previous year

House price inflation running above UK average

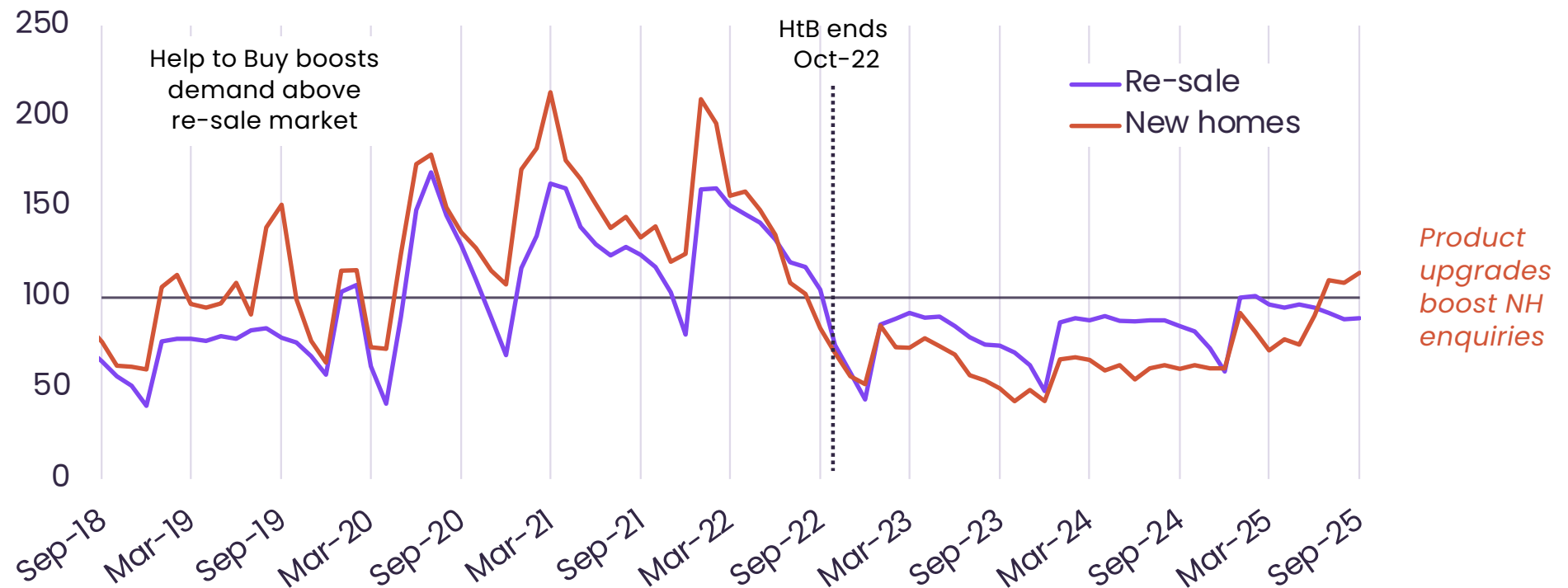
House price inflation by postal area – July 2025



Source: Zoopla Research

New homes demand weaker post HtB and more competition

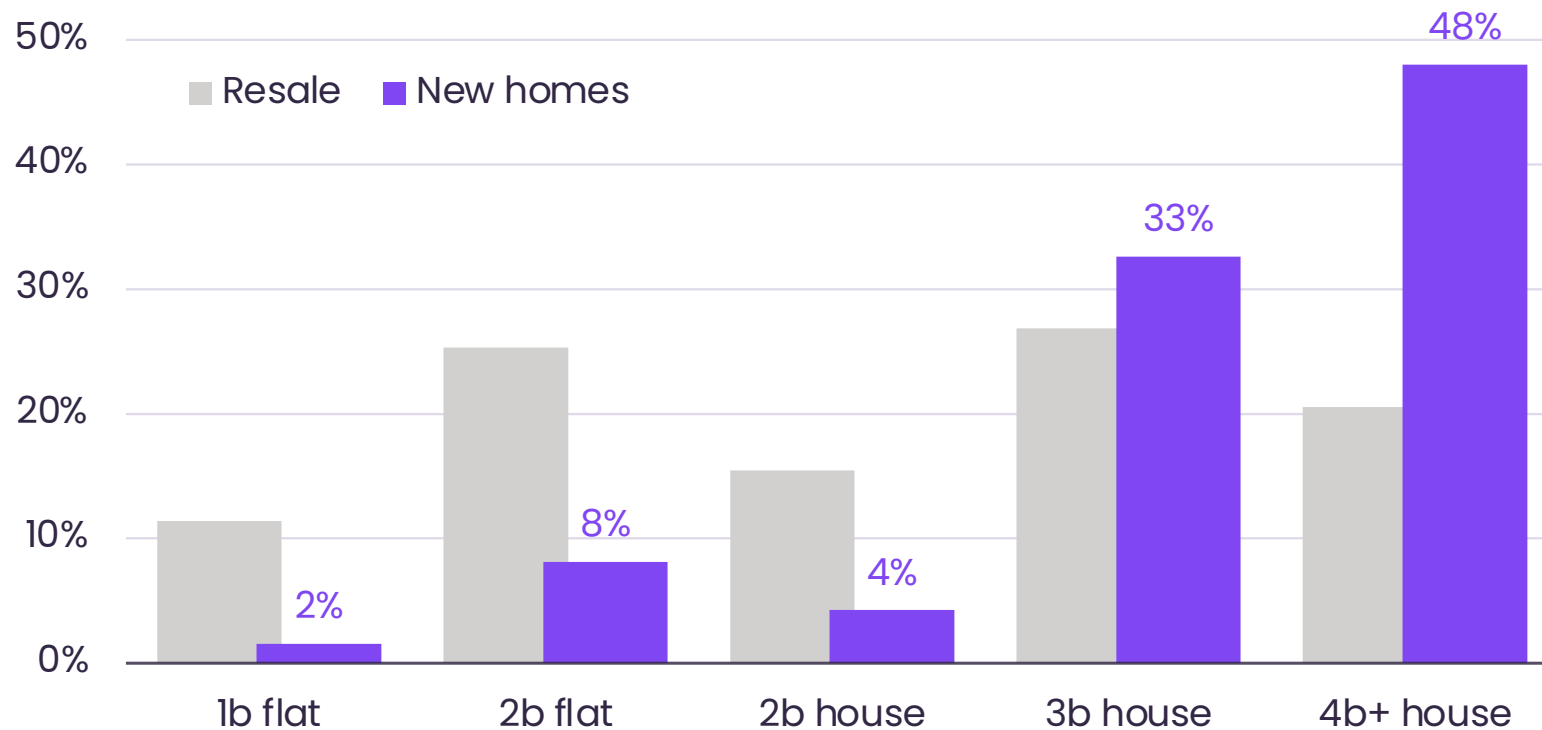
New home buyer demand index – 5yr average = 100



Source: Zoopla Research

New housing for sale in Scotland is 80% 3+ bed houses

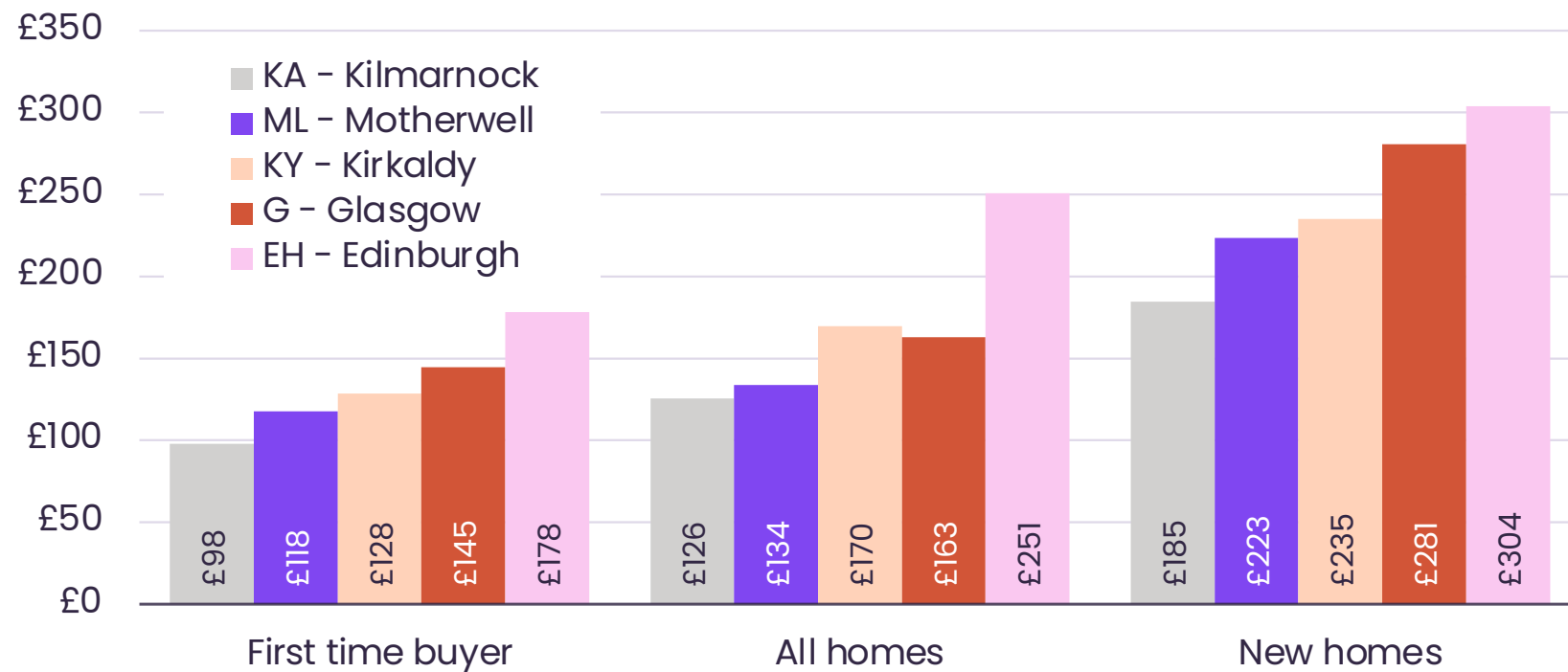
Profile of homes for sale on Zoopla – Scotland



Source: Zoopla Research

Different new homes housing mix = different price points

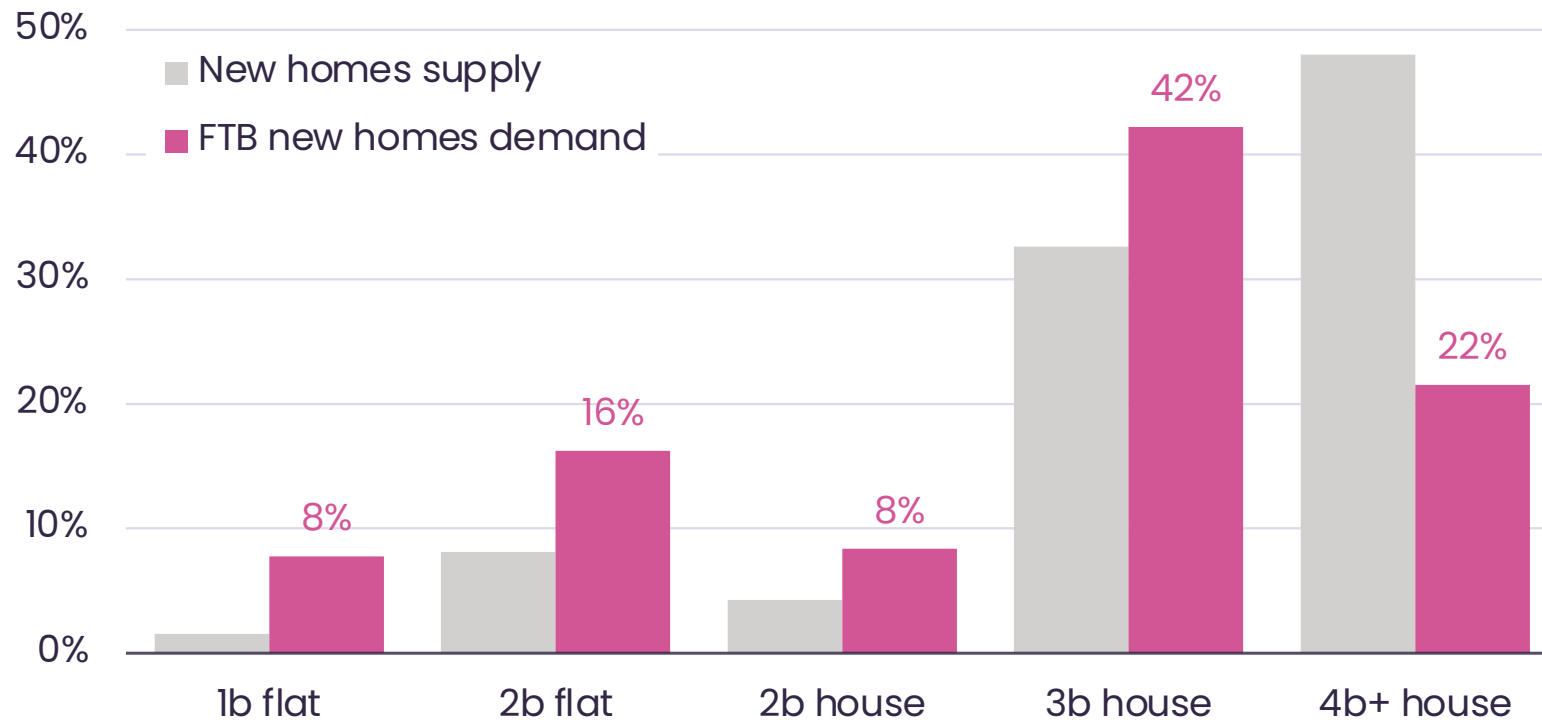
Average sales values for Scottish property listings – resale v new homes – £000s



Source: Zoopla Research

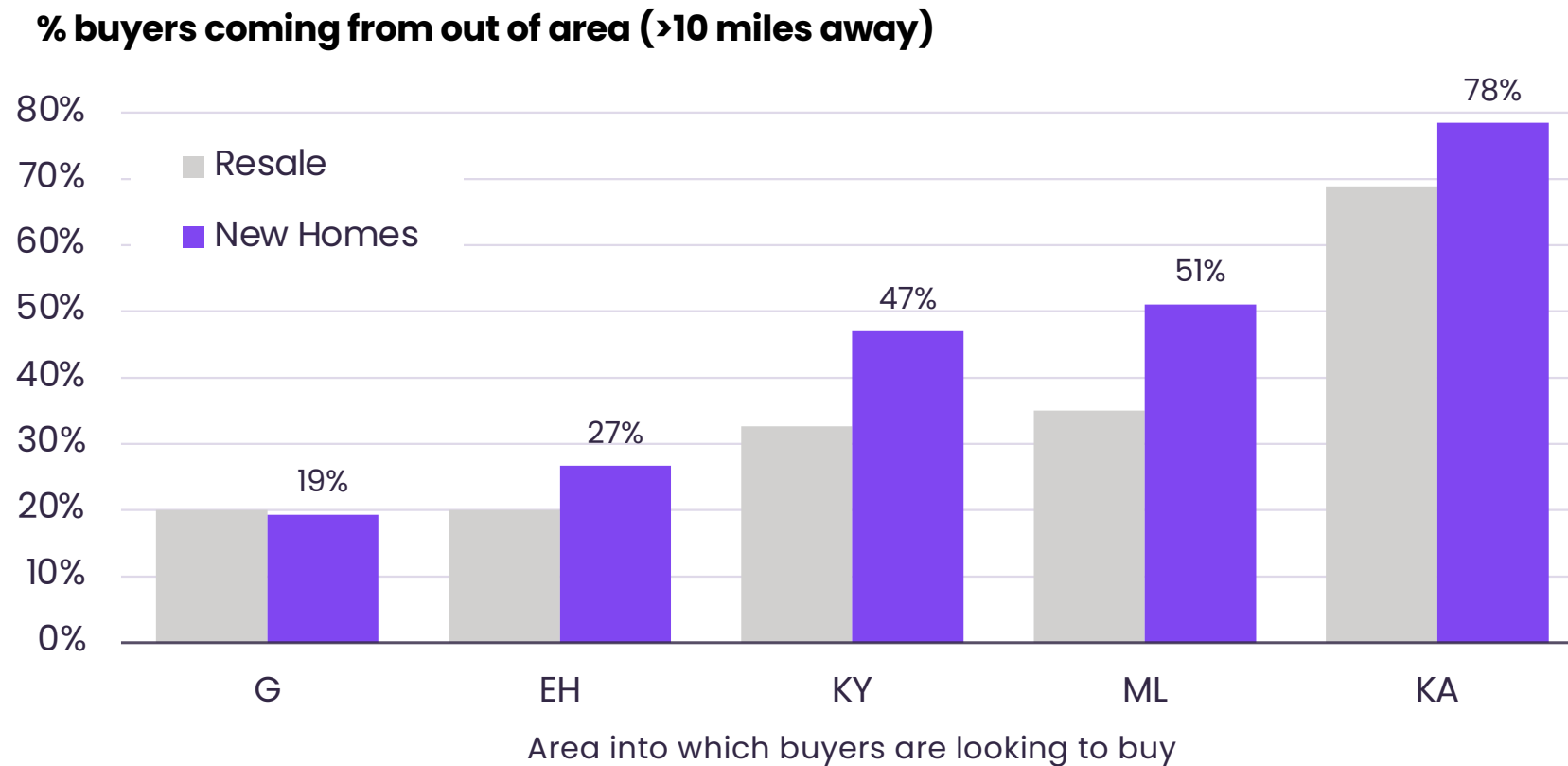
First time buyer demand skews 80% to 2 and 3 beds

Profile of homes for sale on Zoopla – Scotland



Source: Zoopla Research

New homes buyers look further afield – how to target?



Source: Zoopla Research

Unlocking more, better quality new homes buyers

~72% of those looking to move would be **More Likely** to choose a new build property if they could **use a buying scheme for the purchase**

~95% said they'd be interested in a property website telling them **which buying schemes they were eligible for**

Summary

- Slow and steady house price inflation – just enough to support home moves
- Continued competition from the re-sale market
- Plenty of demand to move home – need/affordability trade off
- Affordability and choice driving more people looking out of area
- Richer new home buyer journeys and greater personalisation

**To find out how Zoopla can unlock new homes buyers and the investment we are making for new homes in Scotland ...
... please contact**

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