

# St Barts

## *Luxury market digest*



2025/26  
season

St Barts remains one of the world's most exclusive residential and lifestyle destinations. This report explores the island's luxury property market, profiles significant new openings, and highlights the evolving lifestyle offer – from fine dining and beach clubs to wellness and design-led experiences – that continues to attract global high-net-worth buyers.

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## Island Digest

The 2023 sale of a \$136 million estate near Colombier Beach, known locally as Rockefeller Beach, cemented St Barts' status as one of the world's premier second-home destinations for the ultra-wealthy.

The waterfront estate once owned by David Rockefeller mirrors the island's evolution: he was arguably the first in a long line of globally recognised names to acquire property here, helping transform St Barts into the preferred retreat of the ultra-wealthy.

It's an exclusive – and elusive – destination. Access is famously difficult, but that's part of the appeal. And the island has come a long way since Rockefeller began building what would become a 130-acre estate. Iconic hotels, restaurants and beach clubs like Eden Rock, Nikki Beach and Cheval Blanc have given the island its reputation for hedonism, but it's the privacy, security and low-key luxury that keep high-net-worth individuals coming back.

The 2025/2026 season brings a fresh wave of openings that broaden the appeal of the island's culinary scene. Lucali, the cult Brooklyn pizzeria, has landed in Gustavia. Dubbed "a luxury restaurant disguised as a pizza joint" by The New York Times, the wood-fired spot opened in October 2025 in the former Mi Brasa space.

Joining this winter is Pablo Restaurant, set to open in Gustavia in the prominent space that once housed the celebrated Robuchon. With both first-floor and rooftop settings, Pablo brings a taste of the St Tropez original to St Barts, known for its fusion of Mexican and international cuisine. Finally, Bar des Prés is due to open for Thanksgiving. This will be chef Cyril Lignac's first Caribbean venture, combining "French know-how, Japanese individuality with island way of life," according to the company.

Opening in November, Domaine Padel reflects a broader shift in demand among wealthy buyers and renters: wellness is no longer an add-on but a central part of the lifestyle proposition. The high-end complex will include four premium padel courts, an indoor fitness centre, and a treatment centre offering cryotherapy, light therapy, and osteopathy. With yoga and Pilates studios, a wellness café and a Lululemon boutique also on site, the development underlines a growing preference for health-anchored living in St Barts – a market once defined by indulgence, now evolving to accommodate a more broader definition of luxury.

# My St Barts

James Davies, Partner, Knight Frank Caribbean

### What makes St Barts different from other luxury destinations?

It's the combination of exclusivity and simplicity. The island is incredibly beautiful and well preserved, but access is still tricky. You don't arrive by accident. Everyone has to make a bit of an effort to get here – whether you're flying in from Antigua, San Juan or St Martin or simply arriving by yacht. That creates a certain atmosphere. And despite the glamour, it remains remarkably low-key.

### Who is buying?

It's a mix. A lot of clients are multi-generation wealthy families or seasoned renters who have been coming to the island for years. They already know where they want to be – Gouverneur, Lurin, Flamands. These aren't speculative purchases. People are looking for a long-term base they'll use every year. It's very relationship-driven, with many of

the most desirable homes selling off-market.

### How would you describe the housing stock?

You generally don't buy apartments in St Barts. It's all villas – often architect-designed, set into the hillsides, with sea views or direct beach access. The top end of the market is comfortably above €40 million, especially for beachfront on Flamands. But there's still value in the south of the island, where smaller properties can start from €3.5 million.

### And the lifestyle?

We all know about the nightlife, but there's much more to it. You can spend the day surfing or hiking and still find yourself at a beach club or a restaurant that wouldn't look out of place in any of the world's gateway cities or other top waterfront locations. It's a rare blend – and it's why people fall in love with the island.



"People are looking for a long-term base they'll use every year. It's very relationship-driven, with many of the most desirable homes selling off-market."

# €40<sub>m</sub>

MARKS THE ENTRY LEVEL FOR SUPER-PRIME TRANSACTIONS



# Prime property market overview

The residential market in St Barts remains highly active, despite broader headwinds facing global prime real estate. Demand continues to be driven by returning international buyers who are familiar with the island's lifestyle and constrained housing stock.

According to Hamaka Living, around 80% of buyers are international, with the strongest interest from the US, Canada, France, Switzerland, and the UK. Many purchasers have rented on the island over multiple seasons and are now seeking a more permanent presence. These acquisitions tend to be long-term and lifestyle-driven, rather than speculative.

Average villa sales range from €9 million to €14 million, depending on factors such as location, sea views, and land size.

Recent high-end transactions include a €54 million beachfront villa on Flamands and others in Gouverneur and Domaine du Levant in the €25 million to €45 million range. Entry-level properties in areas such as Vitet and Marigot typically start from around €3.5 million.

The majority of properties are standalone villas with pools and panoramic views. There are no high-rise developments, and zoning restrictions further limit new construction. Many sales take place off-market, contributing to a high degree of opacity in the market.

Rental yields remain attractive at the top end of the market. Seasonal gross income can reach €1.2 million for high-specification homes, providing additional financial rationale for ownership.

## NEW YEAR'S EVE IN GUSTAVIA: WHERE THE WORLD DROPS ANCHOR

Buyers in St Barts often come for a mixture of buzz and the quiet life, but never is it as noisy as New Year's Eve.

Each December, the harbour at Gustavia becomes the backdrop for one of the most extravagant spectacles in the Caribbean: a temporary mooring ground for the world's largest and most luxurious yachts. It is one of the only times of year when vessels of this scale congregate in a single destination – many of them owned or chartered by billionaires, business leaders, and celebrities.

New Year's Eve itself is the pinnacle, marked by a spectacular fireworks display over the bay and a calendar of private parties at villas, beach clubs and on board the yachts themselves. The festive season also brings a surge in ultra-prime villa rentals, with many first-time visitors eventually converting to buyers after experiencing the island at its most vibrant.

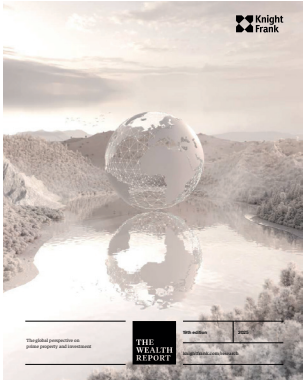
The activity doesn't end on January 1st. Just weeks later, the island hosts the annual St Barts Bucket Regatta – one of the most prestigious events in the superyacht racing calendar. For a niche group of global travellers, it's a winter circuit that begins and ends in Gustavia.



ST BARTS  
KEY ISLAND LOCATIONS



Recent Research



The Wealth Report 2025



The Residence Report  
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Global Super-Prime  
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We like questions, if you've got one about our research, or would like some property advice, we would love to hear from you.

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