

# St Barts

## *Luxury market digest*



2026/27  
season

Few destinations balance exclusivity, authenticity and level of service as successfully as St Barts. This digest explores the island's luxury property market, its expanding profile with UHNWIs and the rental to ownership journey.

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Photo credit Kenzo Khan, @hamakacollection

# Property market update

## St Barts at a glance

70+

transactions in 2025

€6 million

average transaction value

6

transactions above €30m in year to July 2026\*

€45.5 million

top transaction, 2026

95%

of owners opt to rent

\* Estimated

The Caribbean Island is increasingly competing with the world's established super-prime destinations. Six €30 million-plus transactions completed in the past year, underlining St Barts' emergence as a global destination for ultra-high-net-worth buyers. According to James Davies of Knight Frank's International Department, "St Barts has moved decisively from luxury holiday destination to globally recognised ultra-prime residential market. We're seeing growing demand from family offices

and private clients across Monaco, Switzerland and the US, all competing for an exceptionally limited supply of best-in-class property."

With limited land for development and very little scope for new supply, demand for exceptional villas is increasingly concentrated in a small pool of trophy assets. A €45.5 million transaction in Colombier, agreed by Hamaka | Knight Frank in July 2026, provides evidence of this trend. What's behind this? St Barts offers a slice of Europe, combining French culture and sophistication with the informality of the Caribbean all within easy reach of the Americas.

According to Kevin Barrallon, owner of Hamaka | Knight Frank, around 50% of his buyers are North American, with the US East Coast – Boston, New York, Atlanta and Miami – a key source of demand. For these buyers, the combination of French culture, proximity and Caribbean lifestyle is a key draw. The other half are European, alongside a growing number of South Americans, particularly Brazilians.

According to Davies, "It's this combination of exclusivity and simplicity that appeals to clients. Despite the glamour, it remains remarkably low-key, offering rare anonymity."

Estimates from Hamaka | Knight Frank show activity peaked at around 83 transactions in 2024 before settling back to c.70 in 2025 – a resilient level given

the headwinds facing global prime markets, with the average transaction value now around €6 million.

The west of the island remains the most sought-after, with Gouverneur, Flamands and Colombier among the areas in strongest demand, while the east offers a more secluded and natural setting.

According to Knight Frank's *Wealth Report 2026*, prime prices on the island increased 4% in 2025. But for Barrallon, the appeal goes beyond price growth: "Real estate on St Barts is not only an investment in property, but in scarcity, lifestyle and long-term family wealth."

"The complexity of access is itself appealing for most buyers. You don't arrive by accident," says Davies. "Most visitors fly via St Martin or Antigua," he adds, "meaning there is refreshingly few commercial airliners criss-crossing the skies."

Then there are the superyachts. According to YachtBuyer MarketWatch Intelligence, a record 226 superyachts over 78 feet gathered around St Barts for New Year's Eve 2025, up from 170 the previous year. Among them were 13 megayachts over 100 metres – the largest concentration of 100-metre-plus yachts ever recorded at a single event.

Adam Moorey, Head of Business Intelligence at Edmiston, describes it as "probably the hottest ticket in the world at New Year". Almost one in four (24%) of winter charters by the luxury superyacht brokerage in St Barts and St Martin takes place between 25 December and 1 January. Most embark from neighbouring St Martin, given its airport access, with Edmiston charters there increasing by 21% over the past three years.

### Estimated transactions by price band

| Price band       | 2023 | 2024 | 2025 |
|------------------|------|------|------|
| Under €5m        | ~40  | ~45  | ~36  |
| €5m – €10m       | ~21  | ~27  | ~24  |
| Above €10m       | ~9   | ~11  | ~10+ |
| Total (estimate) | ~70  | ~83  | ~70+ |



Villa Esprit de Roche, Colombier

Photo credit Kenzo Khan, @hamakacollection

Source: Hamaka | Knight Frank

# The St Barts Lifestyle

### From renting to owning

According to Barrallon, “St Barts isn't simply a luxury second-home market. It is a second-home-and-rental market. We have around 200+ villas in our rental portfolio and about 95% of owners opt to rent.”

A look at the rental data explains why. While rates vary considerably by property and season, the very best villas can command exceptional prices at the busiest times of year, with some reaching as much as US\$500,000 a week around New Year. For the highest-spec homes, gross annual rental income of US\$1.2 million is within reach.

“The season really kicks off at Thanksgiving,” says Barrallon. “Rents start to rise, peaking over New Year, with many owners instead choosing to visit out of season to maximise rental income.”

According to Barrallon there's a cyclical process that comes from building strong relationships with his clients. Rental demand filters through into sales, as renters explore the island, discover where they like to stay and then decide to buy. “We had one American family who rented the same villa for three consecutive high seasons before buying a four-bedroom villa through us,” says Barrallon.

For Davies there are two distinct buyer groups: “Firstly, we see young wealth creators – tech start-ups, finance or real estate wealth – and then secondly, older buyers looking at having a base

for a globally dispersed family for multigenerational use.”

### The new luxury

St Barts’ appeal is broadening, with new openings encouraging owners to spend longer on the island. Most second homeowners aim to spend five to six weeks there each year. Le Domaine Padel is a new addition this year in St Jean, adding to the island’s growing wellness and leisure offering.

The restaurant scene is also continuing to evolve, with several high-profile names adding to St Barts’ already strong dining line-up. Loulou is set to arrive at Fouquet’s Saint-Barth, bringing the Parisian restaurant’s distinctive style to the island, while Zuma will open in Gustavia in

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November 2026, taking over the former Ocean Club location on the waterfront.

It is a natural evolution rather than a reinvention. The island still does luxury in its own way: good food, great service, yachts, beaches and privacy – best typified by established names such as Eden Rock, Le Toiny and Cheval Blanc.



Villa Linda, Marigot – €19,500,000

Photo credit – Hugo Allard

### The price of staying

Luxury villa rentals by season and bedroom number

| Villa category     | Low season          | High season / March  | Christmas            | New Year             |
|--------------------|---------------------|----------------------|----------------------|----------------------|
| 4 bedrooms         | \$25,000-\$30,000   | \$35,000-\$45,000    | \$50,000-\$75,000+   | \$60,000-\$100,000+  |
| 5 bedrooms         | \$30,000-\$40,000   | \$40,000-\$60,000    | \$65,000-\$110,000+  | \$80,000-\$150,000+  |
| 6 bedrooms+        | \$35,000-\$50,000+  | \$50,000-\$75,000+   | \$80,000-\$150,000+  | \$100,000-\$200,000+ |
| Ultra-lux / Trophy | \$80,000-\$180,000+ | \$100,000-\$200,000+ | \$200,000-\$400,000+ | \$250,000-\$500,000+ |

Source: Hamaka | Knight Frank. Sales values in euros; rental rates in US dollars. Figures are indicative market benchmarks; pricing varies by location, views, privacy, condition and service level. Additional charges: a service fee (typically 10-15%), depending on the rental agency and the 5% local accommodation tax applies on top of the rates above.

## ST BARTS KEY ISLAND LOCATIONS

### THE CARIBBEAN



## The St Barts *season*



**March:** St Barts Bucket Regatta: One of the world's premier superyacht events.



**April:** Les Voiles de St Barth: Widely regarded as one of the Caribbean's leading sailing regattas.



**November:** St Barts Gourmet Festival: Renowned French chefs collaborate with local restaurants to create exclusive dining experiences.



**December:** New Year's Eve in Gustavia: Arguably the event of the year, known locally as "the summit" driving strong visitor numbers and peak rental demand.

### Recent Research



The Wealth Report  
2026



The Residence Report  
2026/27

We like questions, if you've got one about our research, or would like some property advice, we would love to hear from you.

#### Property market enquiries



James Davies  
Partner, Knight Frank Caribbean  
+44 20 7591 2646  
[james.davies@knightfrank.com](mailto:james.davies@knightfrank.com)

#### Research enquiries



Liam Bailey  
Global Head of Research  
+44 7919 303 148  
[liam.bailey@knightfrank.com](mailto:liam.bailey@knightfrank.com)



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