

Coastal Report November 2025

The *rising tide* of coastal properties.



Introduction

Scotland's coastal settlements continue to attract strong demand from homebuyers, with many seaside towns outperforming the national housing market both in price levels and long-term growth.

This report examines the performance of Scotland's coastal housing markets over the past six years, highlighting the dominance of the East Coast and the exceptional desirability of locations such as Elie & Earlsferry, Gullane, Longniddry, St Andrews and North Berwick.

Coastal areas of Scotland are sought-after as housing locations. 9 of the Top 20 (45%) of Scottish settlements with the highest average house price are located on the Scottish coastline.

Elie & Earlsferry again comfortably took top place for the highest priced Scottish coastal town, with an average price close to £572,000. Gullane was again second, with an average price over £522,000, while Longniddry pipped St Andrews for third place, with an average price of around £485,000.

“Coastal settlements in Scotland are sought-after, especially on the East coast, as demonstrated by the high average house price in these areas and the strong level of growth in the last six years. The demand to live in these areas comfortably exceeds the supply available.”



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North Berwick

Key findings.



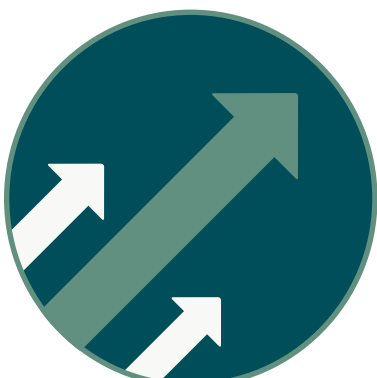
01. Coastal Crown.

9 out of Scotland's Top 20 most expensive settlements are located on the coast.



02. Dominance of The East Coast.

The East Coast dominates, with Fife and East Lothian home to 9 of the top 10 coastal towns on this measure.



03. A Story of Growth.

There has been relatively high growth in a number of these areas since 2019. Longniddry and St Andrews have had the highest growth out of the top 5 towns, up by 39% and 33% respectively.

Key findings *explored.*

01. 9 out of Scotland's top 20 most expensive settlements are located on the coast, with the top 5 all with an average house price higher than £450,000.

Nearly half of Scotland's most expensive settlements are located on the coast. Elie & Earlsferry in East Neuk is the second most expensive settlement in Scotland, only behind Thortonhall in South Lanarkshire.

These coastal settlements all had an average price of c.£325,000 or higher, with the top 5 having an average price above £450,000. This compares to a national average of c.£230,000.



Earlsferry

Key findings *explored.*

02. The East Coast dominates, with Fife and East Lothian home to 9 of the top 10 coastal towns on this measure.

Of the top 10 coastal settlements in terms of average house price, 5 are located in Fife and 4 in East Lothian. The only other (northern) settlement in the top 10 is Findhorn in Moray.

Elie & Earlsferry takes the Number 1 spot once again this year, with an average house price of around £572,000. Gullane in East Lothian is also unchanged in second place, with an average price a little over £522,000. Longniddry moves up two places to third at just over £485,000, with St Andrews and North Berwick each dropping a place to fourth and fifth. Findhorn, Dunbar and Pittenweem are all new entries into the top 10.

Over the last 12 months, Dunbar had the highest number of transactions among these towns, followed by St Andrews, both surpassing 200 sales.

Elie & Earlsferry comfortably has the highest average house price among Scottish coastal towns.



Rettie Research Report

Top 10 Scottish Coastal Towns by Average House Price, 2024/25

Rank	Settlement	Avg. Price (Last 12 Months)	No. Transactions (Last 12 Months)
1	Elie and Earlsferry	£571,777	28
2	Gullane	£522,176	59
3	Longniddry	£485,349	45
4	St. Andrews	£458,733	205
5	North Berwick	£454,844	149
6	Aberdour	£393,611	28
7	Findhorn	£362,767	26
8	Pittenweem	£347,700	30
9	Crail	£335,335	49
10	Dunbar	£324,625	215

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: Only areas with 20 or more sales were included in the analysis.



Key findings *explored.*

03. There has been relatively high growth in a number of these areas since 2019. Longniddry and St Andrews have had the highest growth out of the Top 5 towns, up by 39% and 33% respectively.

4 out of 5 of the top settlements have seen significant price growth over the last six years and in excess of the national average (25%).

The average house price in Elie & Earlsferry in this time has increased by nearly 30%, although the typically low number of transactions here does make for volatility on trends.

In Gullane, where transaction numbers are slightly higher, the average price has grown by 28% since 2019.

Longniddry has had the highest growth in this time period, with the average price increasing by nearly 40%.

A similar story is found in St Andrews, where the average price is up 33% in the same period.

In North Berwick, average price growth is a little lower at 13%, but prices have remained consistently high and stable.

A factor in this significant growth in these seaside towns has been the post-pandemic bounce, which has most benefited attractive hinterland areas that retain good connectivity with the main cities.

Most of the higher priced coastal settlements have seen strong average house price rise growth in recent years.

Average House Price Growth in Top 5 Coastal Settlements and Scotland, 2019-25

Settlement	Avg. House Price Growth Since 2019
Scotland	25%
Elie and Earlsferry	29%
Gullane	28%
Longniddry	39%
St. Andrews	33%
North Berwick	13%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



Focus On: Scotland's Top 5 Coastal Towns

Elie & Earlsferry

Elie & Earlsferry, located in the scenic East Neuk of Fife, is a charming coastal town known for its beautiful beaches, rich history and vibrant community. The town offers a blend of natural beauty and outdoor activities, including water sports and coastal walks.

With stunning views across the Firth of Forth, it is an ideal place for those seeking a peaceful yet active coastal lifestyle.

It is a small town, with fewer than 1,000 residents and it has a high rate of second home ownership, particularly among Edinburgh residents looking for fresh air and weekends away.

Its average price has been boosted in recent years by several high value sales in a low volume market, with six £1 million plus sales in 2024 (with the highest at £2.4 million). In 2025 to date, most sales were concentrated between the £250,000 and £500,000, which, combined with the thinness of the market, explains the significant decrease in the average house price.

Year	Elie & Earlsferry	YoY Growth	Total Growth Since 2019
2019	£443,707		
2020	£433,950	-2%	-2%
2021	£436,070	0%	-2%
2022	£502,890	15%	13%
2023	£742,765	48%	67%
2024	£823,728	11%	86%
2025 (To Date)	£571,777	-31%	29%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



“Elie & Earlsferry epitomise the charm and exclusivity of the East Neuk, a small, tightly held market where limited supply and exceptional lifestyle appeal combine to support strong values. Together, these villages highlight the depth of demand for premium coastal living in Fife.”

— George Lorimer, Director, Rettie St. Andrews

Gullane

Gullane, in East Lothian, is a picturesque seaside village known for its stunning sandy beach and world-class golf courses, including Muirfield. The village offers natural beauty and recreational activities, making it ideal for residents and visitors.

Gullane Beach, with its expansive sands and views over the Firth of Forth, is perfect for family outings and water sports. The village also boasts a rich history, with the ruins of the Old Church of St. Andrew adding to its charm.

Gullane has become a foodie attraction with a number of prominent restaurants including Chez Roux at Greywalls and Tom Kitchin’s Bonnie Badger. In recent years, the Gullane Food & Drink Festival (sponsored by Rettie) has also helped to place Gullane as a pre-eminent lifestyle town.

Year	Gullane	YoY Growth	Total Growth Since 2019
2019	£406,685		
2020	£488,515	20%	20%
2021	£483,661	-1%	19%
2022	£597,724	24%	47%
2023	£517,551	-13%	27%
2024	£486,838	-6%	20%
2025 (To Date)	£522,176	7%	28%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



Longniddry

Longniddry, in East Lothian, is a charming coastal village around 12 miles from Edinburgh. Known for its beautiful beaches, Longniddry Bents, the village offers a serene escape with stunning views over the Firth of Forth. The village is steeped in history, with landmarks like the 18th Century Gosford House, a magnificent neo-classical mansion.

Longniddry is perfect for golf enthusiasts, featuring the scenic Longniddry Golf Club. The village also boasts a vibrant community with local shops, a community centre and excellent transport links, making it an ideal location for those seeking a peaceful yet connected lifestyle.

Year	Longniddry	YoY Growth	Total Growth Since 2019
2019	£348,066		
2020	£377,238	8%	8%
2021	£395,497	5%	14%
2022	£433,099	10%	24%
2023	£439,288	1%	26%
2024	£511,493	16%	47%
2025 (To Date)	£485,349	-5%	39%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



St. Andrews

St Andrews, on the east coast of Fife, is a historic town renowned as the 'home of golf' and features the world-famous Old Course. It is also home to Scotland's oldest University and the third oldest in the UK. The town's rich history is evident in landmarks such as St Andrews Cathedral and St Andrews Castle, offering stunning views over the North Sea.

With beautiful sandy beaches like West Sands Beach, a vibrant community, and a variety of shops, cafes, and restaurants, St Andrews provides an exceptional quality of life. Its blend of historical charm, academic excellence, and recreational opportunities makes it a highly desirable location for property buyers seeking a rich and fulfilling lifestyle.



The University and golf are central to the town's lifestyle and key drivers for its housing market. The new St Andrews West expansion is delivering a mix of uses including a new home for Madras College; university and employment areas; a new civic centre; as well as new homes and a new care home. Rettie are the selling agent for new apartments and townhouses being delivered by Headon Developments and S1 Developments, awarded as best small housing development of the year at the Scottish Home Awards in 2024.

Year	St. Andrews	YoY Growth	Total Growth Since 2019
2019	£345,286		
2020	£412,139	19%	19%
2021	£401,946	-2%	16%
2022	£478,712	19%	39%
2023	£472,620	-1%	37%
2024	£548,112	16%	59%
2025 (To Date)	£458,733	-16%	33%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



“St. Andrews and Elie & Earlsferry continue to demonstrate the enduring strength of Fife’s coastal market. St. Andrews remains one of Scotland’s most consistently sought-after destinations, underpinned by its global profile, exceptional amenities and the steady demand generated by the University and the town’s world-renowned golf heritage.”

— George Lorimer, Director, Rettie St. Andrews

North Berwick

North Berwick, in East Lothian, is a highly desirable seaside town known for its stunning beaches and historic landmarks like Tantallon Castle. With famous golf courses, including the North Berwick Golf Club, and a vibrant community filled with shops, cafes, and restaurants, it offers a lively and welcoming atmosphere. In addition, the local High School has a high educational attainment level.

Just 25 miles from Edinburgh, North Berwick combines historical charm, recreational opportunities and convenient commuting options, making it a prime choice for property buyers.



Year	North Berwick	YoY Growth	Total Growth Since 2019
2019	£401,872		
2020	£415,358	3%	3%
2021	£440,407	6%	10%
2022	£450,220	2%	12%
2023	£453,178	1%	13%
2024	£467,320	3%	16%
2025 (To Date)	£454,844	-3%	13%

Source: Rettie analysis of @Crown Copyright Registers of Scotland
Note: 2025 based on a 12-month rolling basis



“East Lothian’s coastal Towns & Villages continue to stand out as one of Scotland’s most resilient and desirable property markets. Each town offers its own unique blend of lifestyle, connectivity and coastal character, yet all share the same underlying strength: demand consistently and significantly outstrips supply. Longniddry’s exceptional growth over recent years, Gullane’s enduring appeal as a premium lifestyle destination, and North Berwick’s stability at the top end of the market collectively underline the depth and durability of buyer appetite here. These communities embody the very best of East Coast living.”

— Emma Hay, Associate Director, Town & Country Homes

Conclusion.

Scotland's coastal property markets remain some of the strongest and most resilient in the country, underpinned by enduring lifestyle appeal, high-quality natural environments and close ties to employment and cultural centres. The East Coast, in particular, maintains a clear lead, with Fife and East Lothian accounting for the majority of the highest-priced coastal towns and showing sustained price growth above national levels.

While individual markets vary in volume and annual fluctuations, the likely long-term trend is one of significant appreciation in value, supported by consistent demand from local buyers, second-home purchasers and those seeking flexible post-pandemic lifestyles.

As this report shows, coastal communities are likely to remain premium markets, with continued upward pressure on prices unless supply increases meaningfully. These areas will therefore continue to play a pivotal role in Scotland's broader housing landscape, both economically and demographically, in the years ahead.



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