

Market Briefing July 2026

St Andrews & East Neuk: *One of Scotland's Strongest Housing Markets*



Introduction

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 East Neuk of Fife lies on the eastern corner coastal region of Fife, just south of St Andrews. It includes the settlements of Anstruther, Elie & Earlsferry, St Monans, Pittenweem and Crail. Known for their beautiful beaches and vibrant communities, these small coastal villages and towns offer stunning views across the Firth of Forth and are ideal places for those seeking a peaceful yet active coastal lifestyle.



Source: Google Earth

Rettie Research Report



“Our team at Rettie is deeply rooted in St Andrews and the East Neuk, with first-hand experience of living and working in such a vibrant and thriving part of Scotland. That perspective provides valuable insight into the area’s continued popularity, where lifestyle, community and market strength come together to create one of the country’s most compelling residential markets.”

George Lorimer
Director, Rettie St Andrews



“The reception for St Andrews West since launch has been fantastic to see, with sustained demand from both national and international buyers. The development combines contemporary architecture and strong sustainability credentials with a coastal town lifestyle that few locations can match. For golf enthusiasts, residents are eligible to apply for a St Andrews Links Ticket, offering direct access to the town’s historic courses. It really is a considered, forward-thinking extension of the town itself, and with a selection of apartments and houses now available, it’s a great time to secure a home in this new community.”

Claire Birrell
Associate Director, Rettie New Homes



Braeburn, St Andrews West

Key findings.



01. The main St Andrews & East Neuk settlements rank in the top 15 settlements in Fife based on average house price.



02. Most St Andrews & East Neuk settlements have had increases in average house prices above the national average since 2020.



03. Detached properties command a clear premium in the area and well above the national average.



04. The number of property listings in St Andrews & East Neuk spiked in late 2024 before settling back, but has continued to grow for prime listings.

Key findings *explored.*

01. The main St Andrews & East Neuk settlements rank in the top 15 settlements in Fife based on average house price.

Over the last 12 months, Elie & Earlsferry has the highest average house price in Fife, at just under £550,000. St Andrews is ranked second, with an average price a little over £480,000. Crail and Pittenweem are also in the top 10 in Fife, with St Monans and Anstruther inside the top 15.

Across the whole of St Andrews & East Neuk, the average house price is over £400,000, which is nearly double the national average.

Elie & Earlsferry had the highest average house price in the area in the last 12 months.

Average Sale Price and Count of Sales, last 12 months.

Rank (Fife)	Settlement	Average Price	Count
1 (1)	Elie & Earlsferry	£548,423	23
2 (2)	St. Andrews	£482,879	204
3 (4)	Crail	£353,099	49
4 (10)	Pittenweem	£288,579	29
5 (11)	St. Monans	£277,217	15
6 (13)	Anstruther	£259,739	94
Total		£401,014	410

Source: @Crown Copyright Registers of Scotland / Rettie



Key findings *explored.*

02. Most St Andrews & East Neuk settlements have had increases in average house prices above the national average since 2020.

Since 2020, the average house price in Scotland has increased by 21%.

Across much of East Neuk, this rise has been higher, with some areas having very significant rises (St Monans up by 53% and Crail by 39%). However, higher value areas have seen more limited growth, with St Andrews up 10% and average prices stable in Elie & Earlsferry over this time.

Most East Neuk settlements have had average house price rises above the national average.

Average House Price Growth, 2020-25.

Settlement	Average House Price Growth Since 2020
Scotland	21%
Elie & Earlsferry	-1%
St. Andrews	10%
Crail	39%
Pittenweem	20%
St. Monans	53%
Anstruther	28%

Source: @Crown Copyright Registers of Scotland / Rettie



Key findings *explored.*

03. Detached properties command a clear premium in the area and well above the national average.

Detached properties carry a particular premium in St Andrews & East Neuk. All the main settlements have an average detached house price well above that of Scotland's, which in the last 12 months averaged around £350,000.

Elie & Earlsferry have the highest average detached house price in the local area, at £617,500 in the last 12 months. St Andrews ranked second at just under c.£580,000, followed by Pittenweem at just under £440,000.

Detached homes command a clear premium in the local area.

Average House Price by Property Type, last 12 months.

Settlement	Detached	Semi-Detached	Terraced
Anstruther	£405,808	£255,315	£276,773
Crail	£429,060	£282,982	£374,035
Elie & Earlsferry	£617,500	£537,618	£633,139
Pittenweem	£437,878	£244,964	£252,333
St. Andrews	£576,554	£416,039	£394,458
St. Monans	£359,333	£270,250	£311,000

Source: @Crown Copyright Registers of Scotland / Rettie



Key findings *explored.*

04. The number of property listings in St Andrews & East Neuk spiked in late 2024 before settling back, but has continued to grow for prime listings.

The count of properties listed for sale in the area has steadily increased since 2022, hitting a peak of just under 1,600 listings towards the end of 2024 and the start of 2025.

This could partly be due to the 200% Council Tax premium on second homes implemented by the Fife Council at the beginning of 2024.

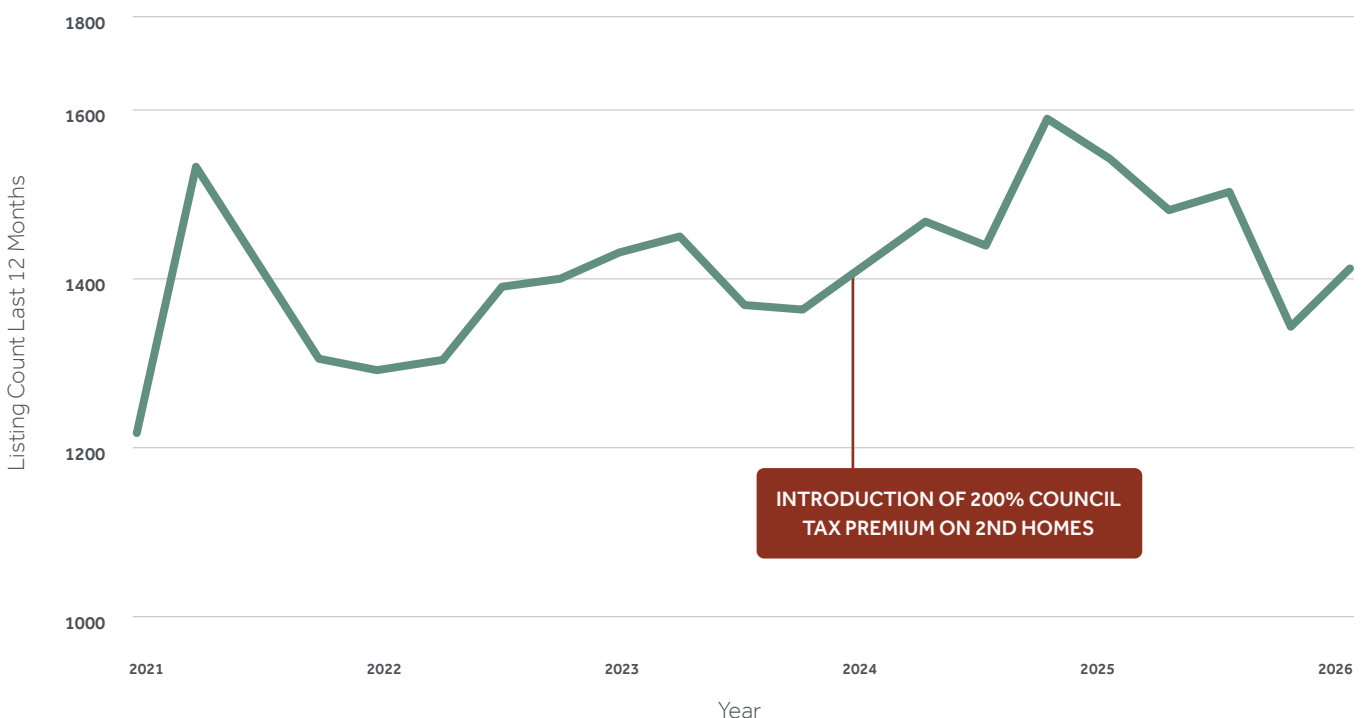
However, over 2025-26 to date, listings have retreated to more normal levels.

In the prime market (above £750,000), the volume of listings has continued to rise in recent years and is well ahead of the Scottish prime market in terms of the growth in listings since 2020. This indicates that the supply of prime properties in St Andrews has grown sharply since 2020 and, unlike the overall market, has not abated. This means that there is more choice in the prime market and has implications for time to sell

The number of property listings in St Andrews & East Neuk has dropped back after spiking in late 2024.

Market Availability in St Andrews & East Neuk, 2021-26.

Listing Count Last 12 Months by Year and Quarter.



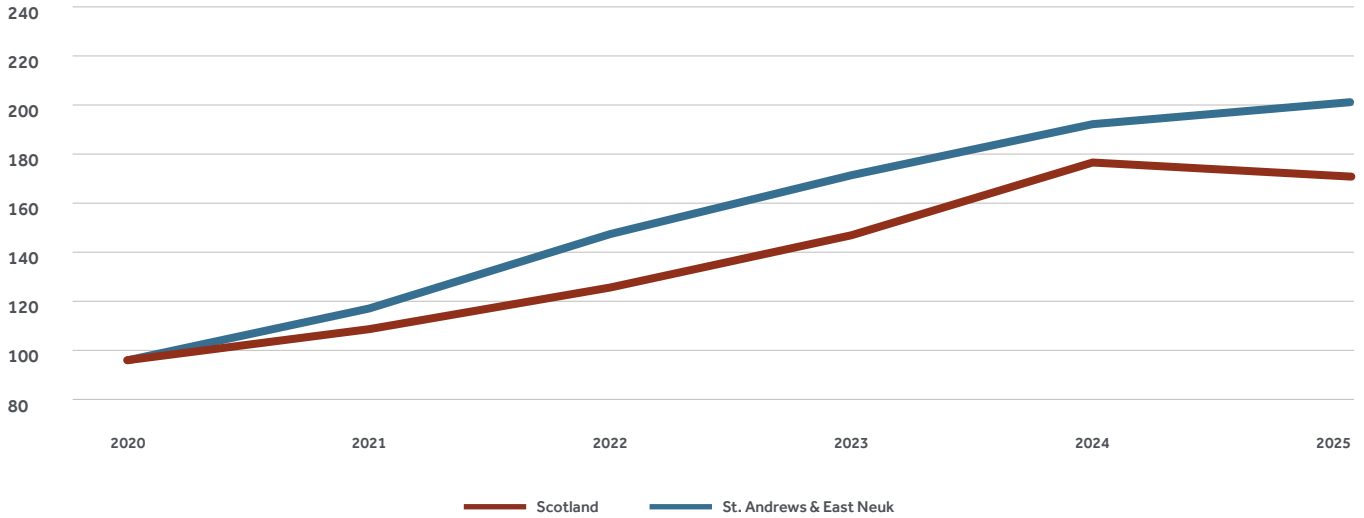
Source: Rightmove / Rettie

Rettie Research Report

The number of premium listings has increased at a faster rate in St Andrews & East Neuk.

Count of £750k+ Listings in St Andrews & East Neuk vs Scotland, 2020-26 (2020 = 100).

Count of Listings, £750k and above.



Source: Rightmove / Rettie



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