

Monthly Indicators



BONITA SPRINGS-ESTERO
— REALTORS® —

September 2025

September showed a stabilizing trend across Southwest Florida's housing market. New listings dipped slightly from 4,944 to 4,838 (−2.1%), while pending sales improved from 2,962 to 3,393 (+14.6%), and closed sales inched up from 2,536 to 2,588 (+2.1%). Inventory finished at 24,557 homes (+9.1% YoY), with months' supply rising to 9.5 (+6.7%). Marketing times lengthened again—median days to contract rose to 68 (from 50)—and sellers received 94.2% of list price on average, as negotiation margins widened slightly. The overall median price reached \$365,000 (+4.3% YoY), maintaining resilience despite slower absorption.

By segment, single-family homes posted a median of \$420,000 (DOM 64) versus \$415,000 last September, while condos recorded a median of \$350,000 (DOM 99) versus \$365,000—reflecting modest single-family strength and continued price adjustments for attached units amid higher supply and longer marketing times.

Year-to-date through September, closed sales are 26,759 vs 29,650 (−9.8%), new listings total 53,710 vs 52,344 (+2.6%), the YTD median price is \$367,490 vs \$370,000 (−0.7%), pending sales are 22,764 vs 24,700 (−7.8%), and median days to contract lengthened to 59 (from 46). The combination of steady listing activity, longer selling times, and restrained price growth indicates a more balanced and negotiable market heading into fall.

Quick Facts

+2.1%

Change in Closed
Sales All Properties

+4.3%

Change in Median
Sales Price All
Properties

+9.1%

Change in Homes for
Sale All Properties

This report covers residential real estate activity in the Bonita Springs-Estero area. Percent changes are calculated using rounded figures. Includes Property Types: Single Family Residence, Condo/Townhouse, Multi-Family

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Single Family Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Single Family properties only



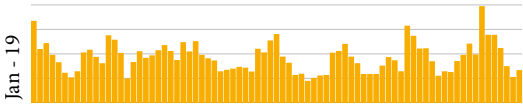
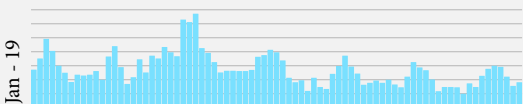
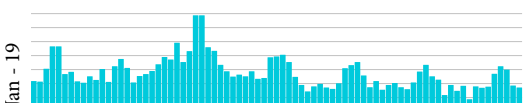

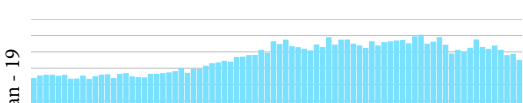
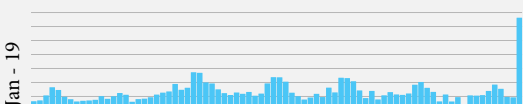
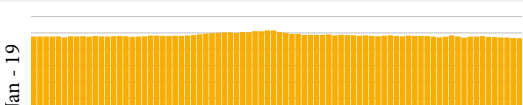
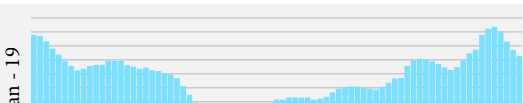
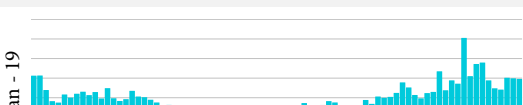
Key Metrics	Historical Graph	9-2024	9-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		2,395	2,425	1.25%	25,911	27,352	5.56%
Pending Sales		1,605	2,049	27.66%	13,253	13,499	1.86%
Closed Sales		1,336	1,502	12.43%	14,954	14,998	0.29%
Days on Market (Median)		51	64	25.49%	47	57	21.28%
Median Sales Price		\$415,000	\$420,000	1.20%	\$450,000	\$430,000	-4.44%
Sold Dollar Volume		\$878,527,389	\$1,044,222,268	0.2%	\$11,190,598,824	\$11,428,267,206	0.3%
Percent of List Price Received		96.50%	95.50%	-1.04%	96.30%	95.60%	-0.73%
Inventory of Homes for Sale		9,725	10,242	5.32%			
Months Supply of Inventory		7.3	6.8	-6.85%			

Current as of October 10th, 2025. All data from Bonita Springs-Estero Board of Realtors® MLS.

Condo Market Overview

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Condo properties only.



Key Metrics	Historical Graph	9-2024	9-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		1,252	1,177	-5.99%	13,651	13,787	1.00%
Pending Sales		705	864	22.55%	6,166	5,841	-5.27%
Closed Sales		543	618	13.81%	7,190	6,739	-6.27%
Days on Market (Median)		80	99	23.75%	53	73	37.74%
Median Sales Price		\$365,000	\$350,000	-4.11%	\$410,000	\$365,000	-10.98%
Sold Dollar Volume		\$285,626,542.00	\$331,553,495.00	16.1%	\$4,460,157,816	\$3,807,742,567	-14.6%
Percent of List Price Received		94.90%	93.50%	-1.48%	95.50%	94.10%	-1.47%
Inventory of Homes for Sale		5768	6,043	4.77%			
Months Supply of Inventory		10.6	9.8	-7.55%			

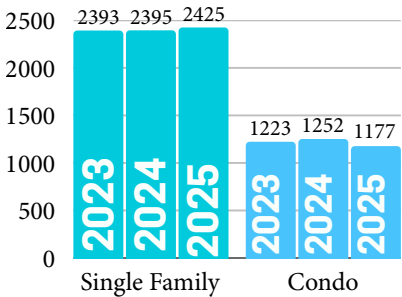
Current as of October 10th, 2025. All data from Bonita Springs-Estero Board of Realtors® MLS.

New Listings

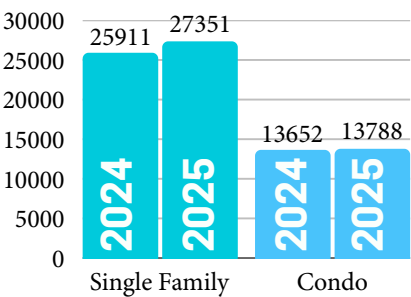
A count of the properties that have been newly listed on the market in a given month.



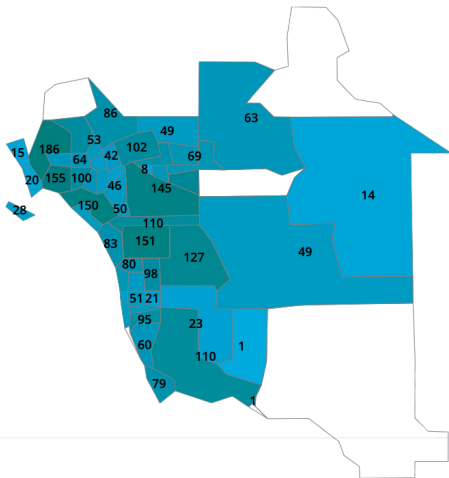
September



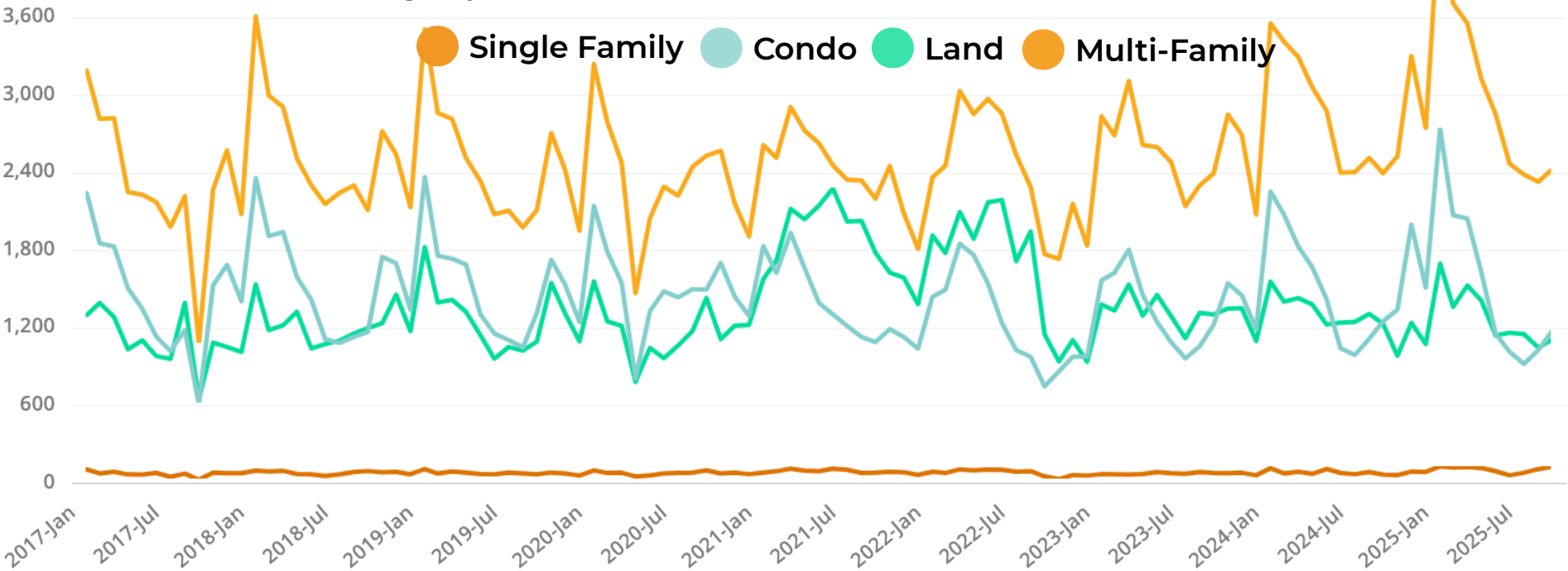
Year to Date



September New Listings SFH+Condo



Historical New Listings by Month



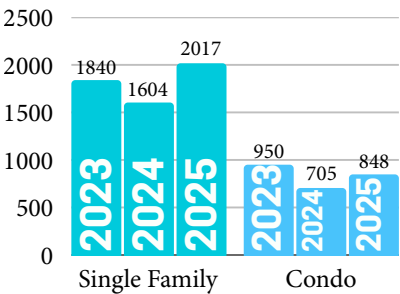
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Pending Sales

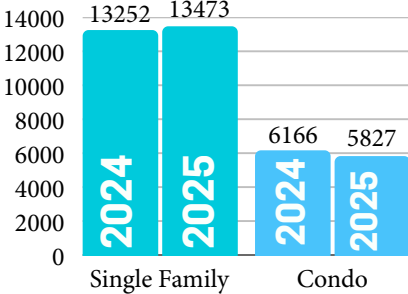
A count of the properties on which offers have been accepted in a given month.



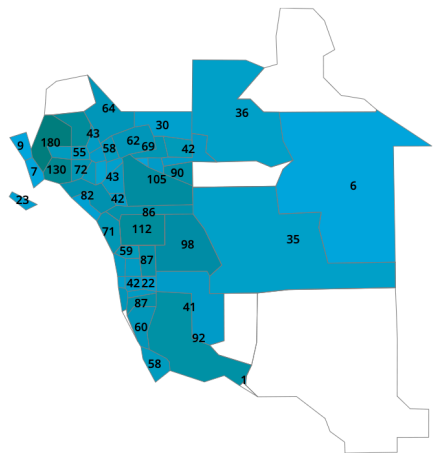
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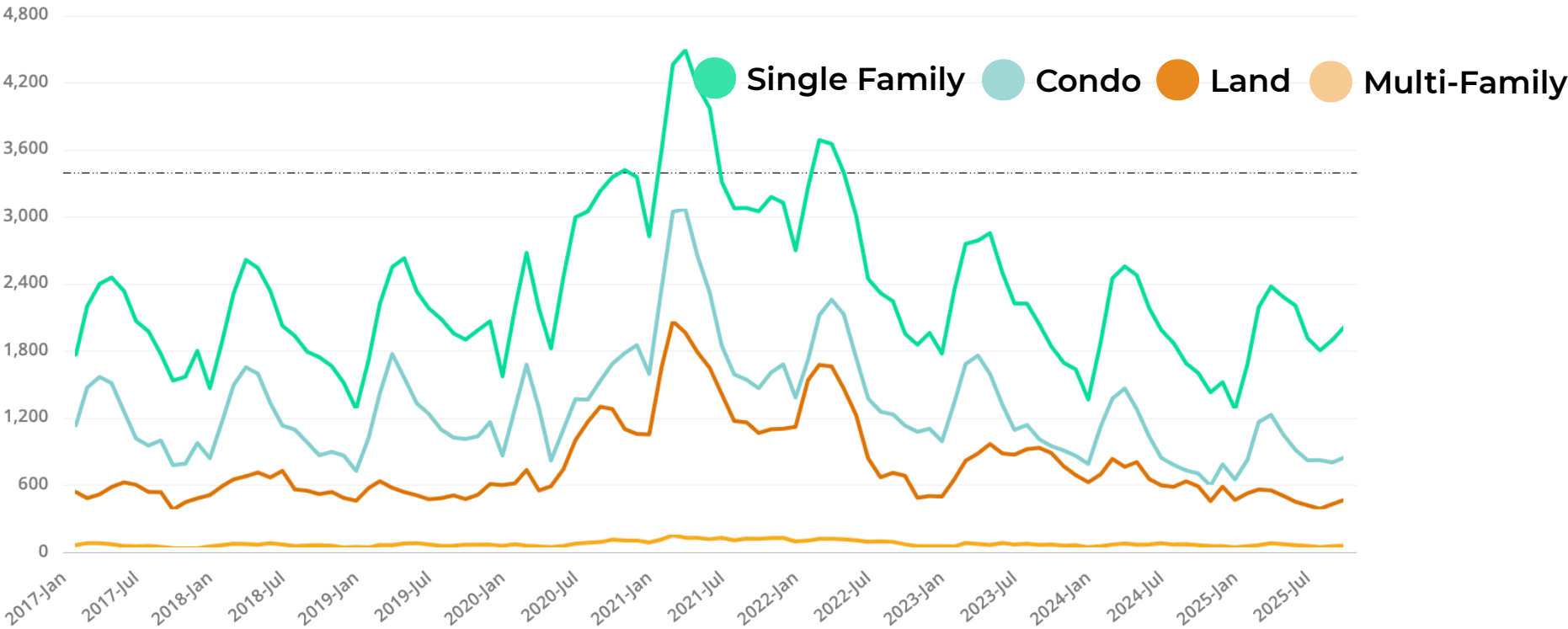
Year to Date



September Pending Sales
SFH+Condo



Historical Pending Listings by Month



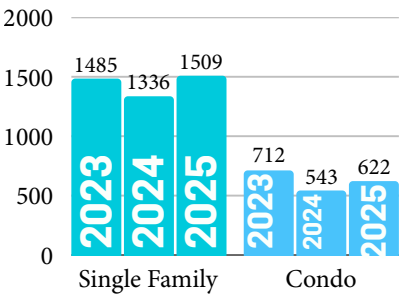
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Closed Sales

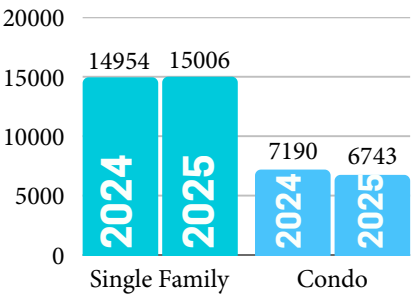
A count of the actual sales that closed in a given month.



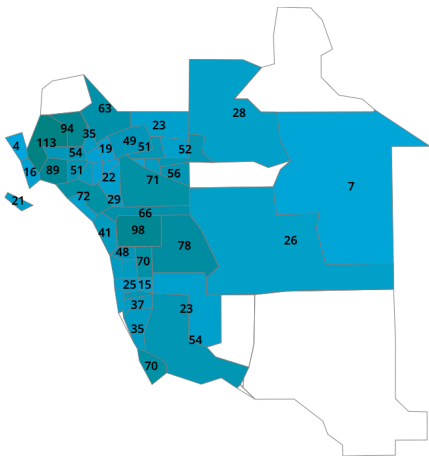
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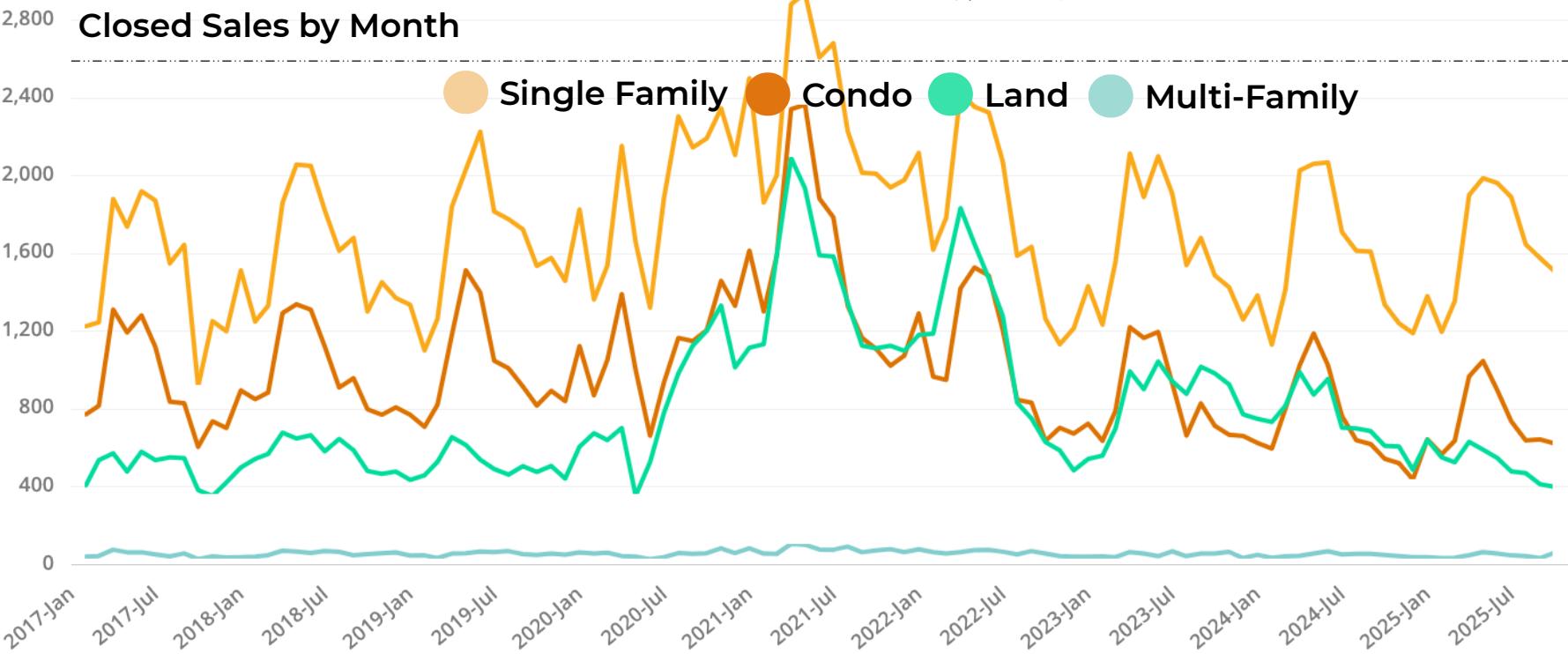
Year to Date



September Closed Listings SFH+Condo



Closed Sales by Month



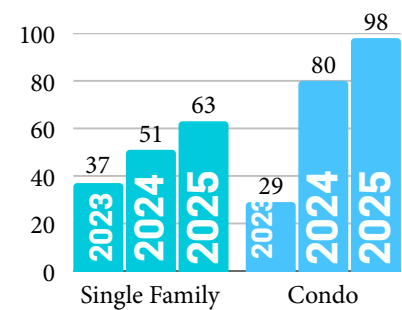
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Days on Market Until Sale

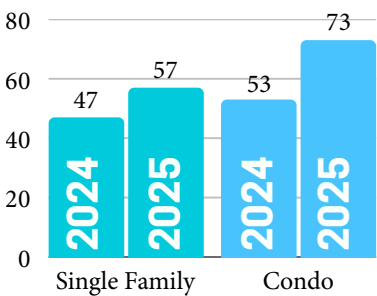
Average number of days between when a property is listed and when an offer is accepted in a given month.



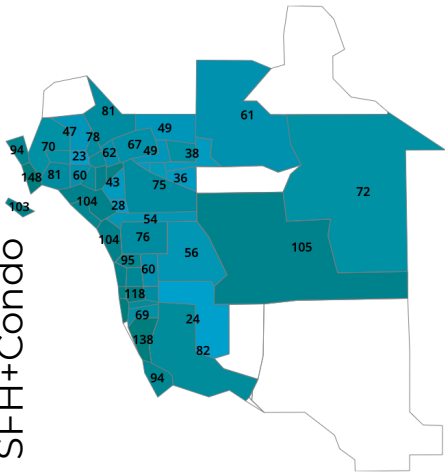
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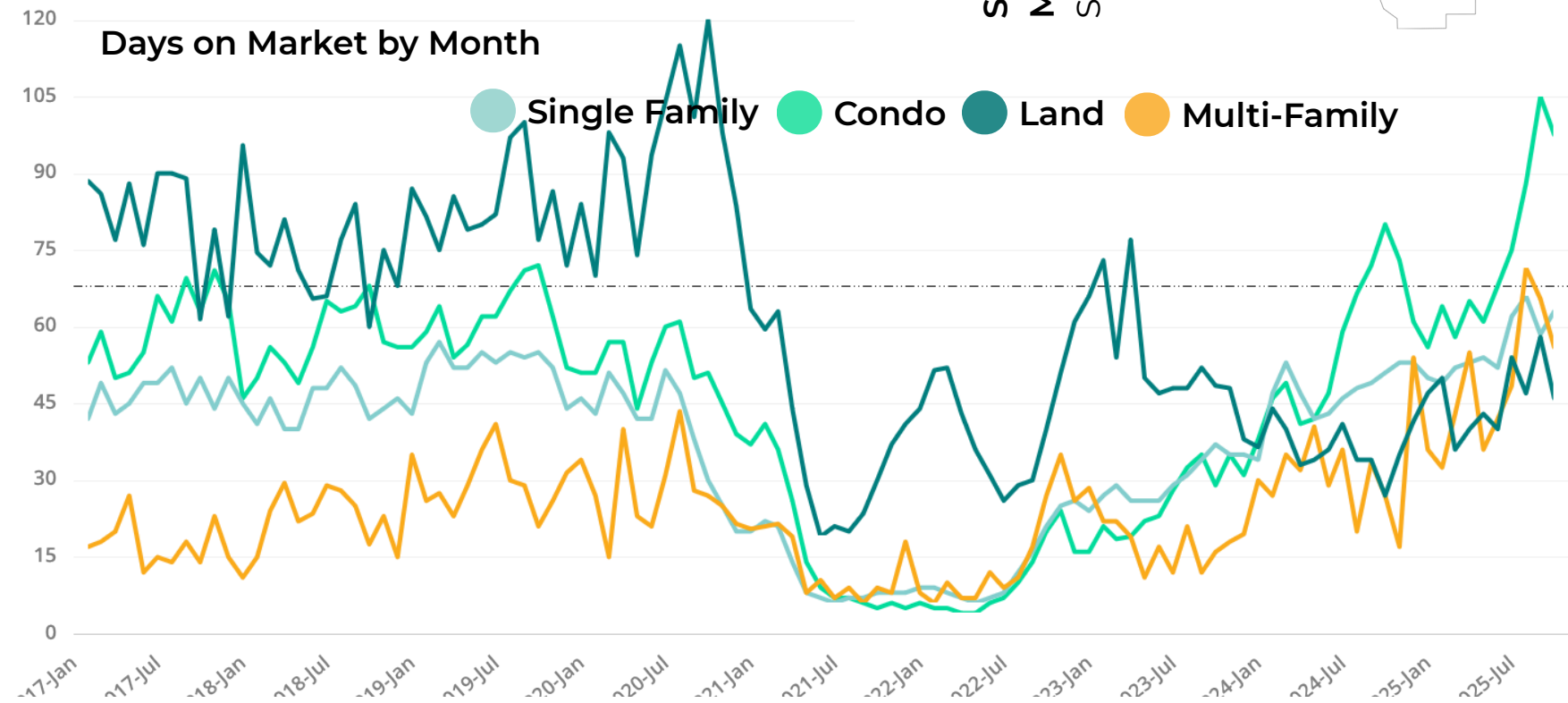
Year to Date



September Days on Market SFH+Condo



Days on Market by Month



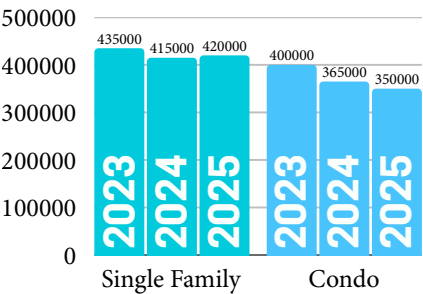
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Median Sales Price

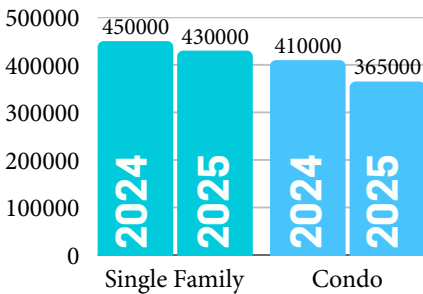
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



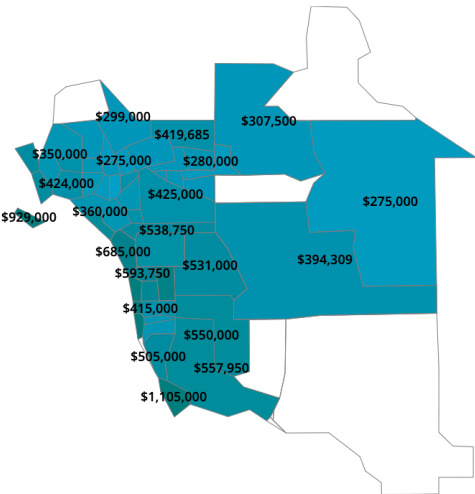
September



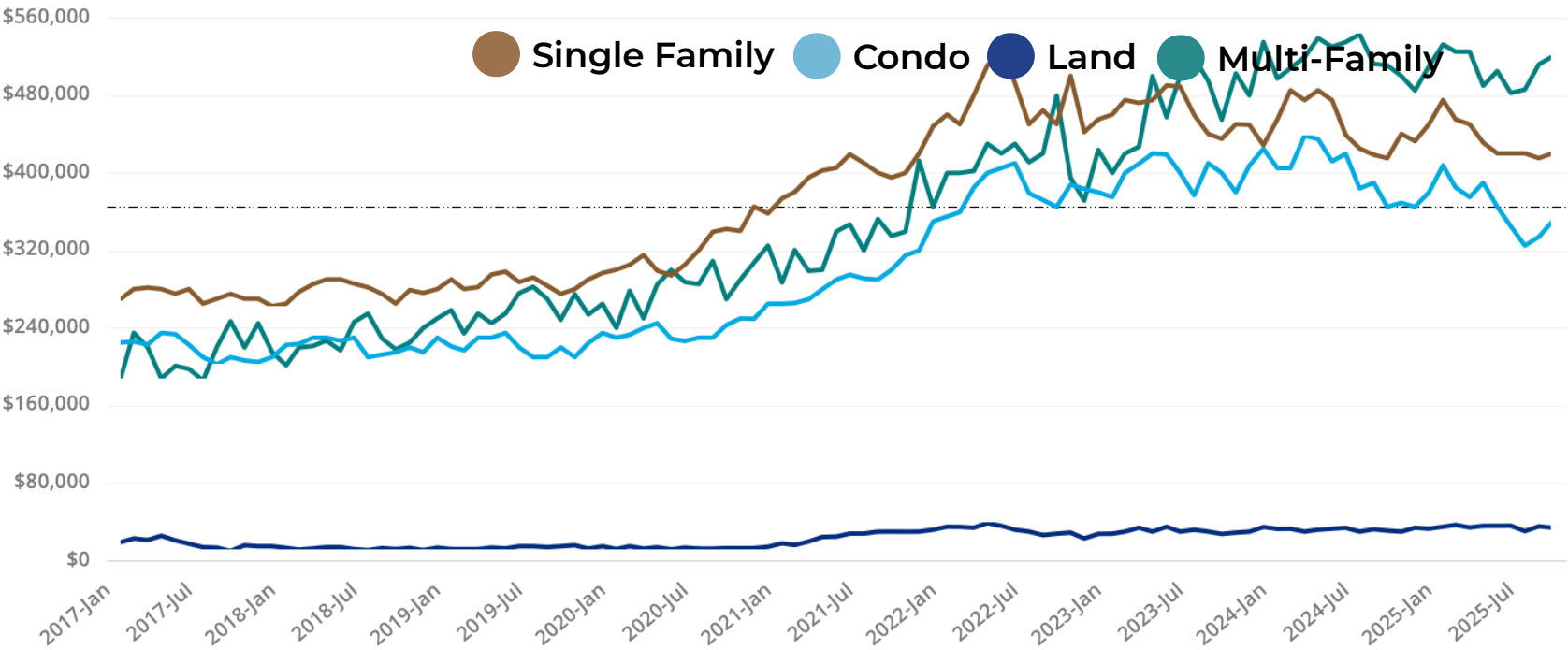
Year to Date



September Median Sales Price
SFH+Condo



Median Sales Price by Month



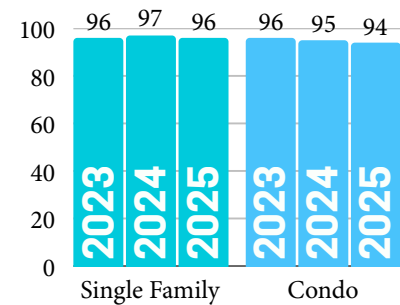
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Percent of List Price Received

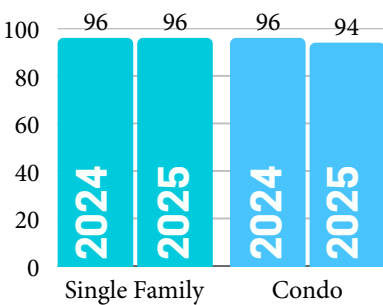


Percentage found when dividing a property’s sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

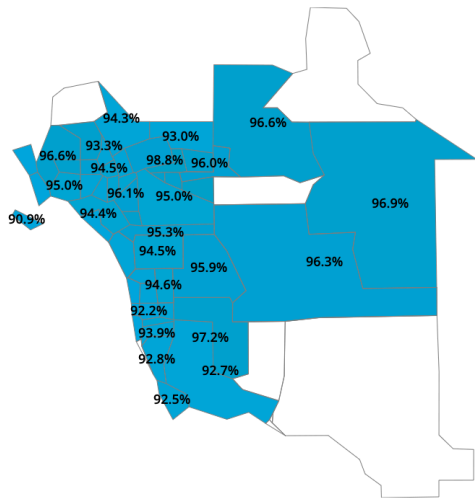
September



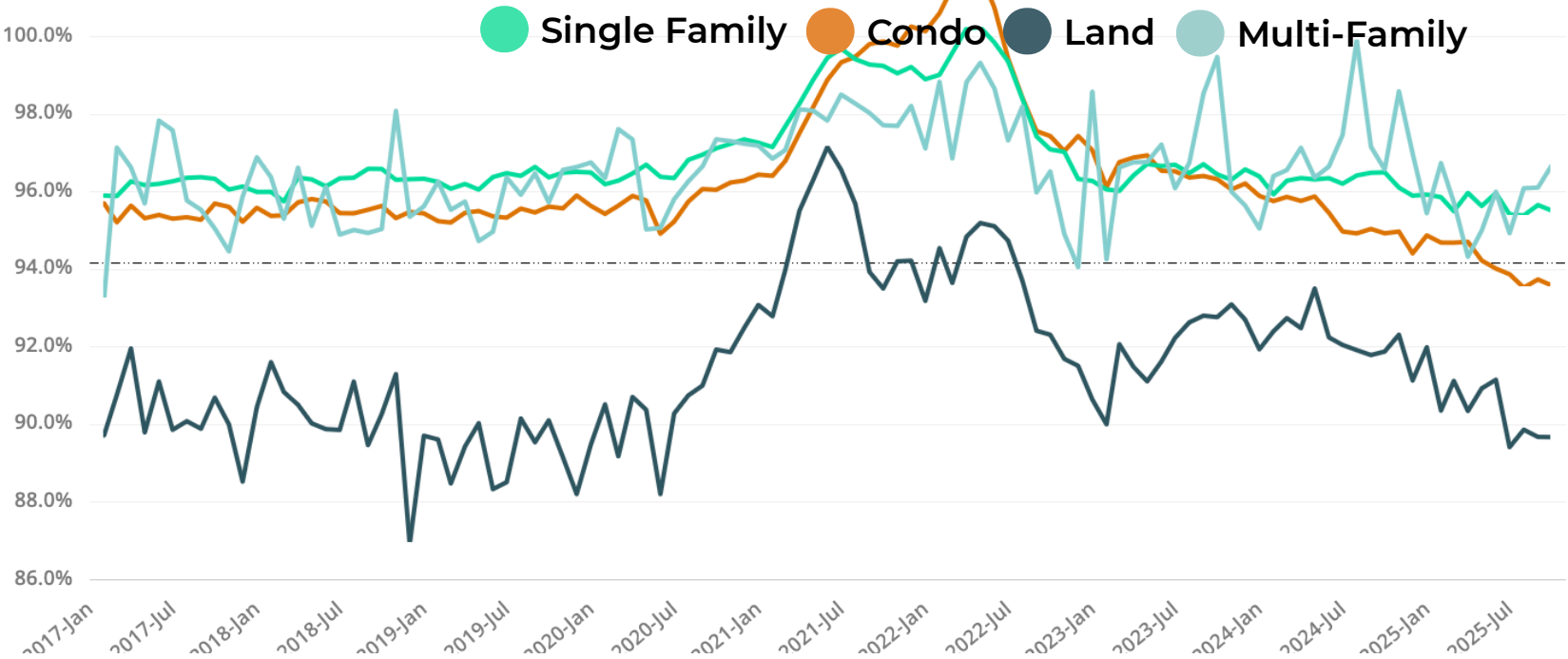
Year to Date



September New Listings
SFH+Condo



Historical New Listings by Month



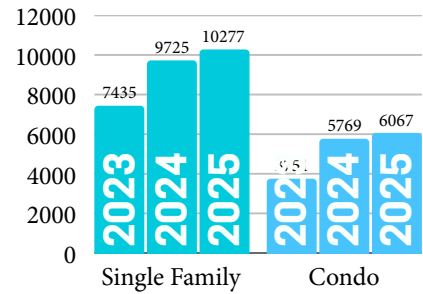
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Inventory of Homes for Sale

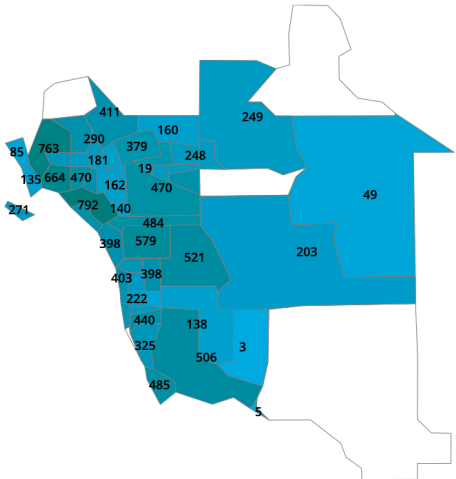
The number of properties available for sale in active status at the end of a given month.



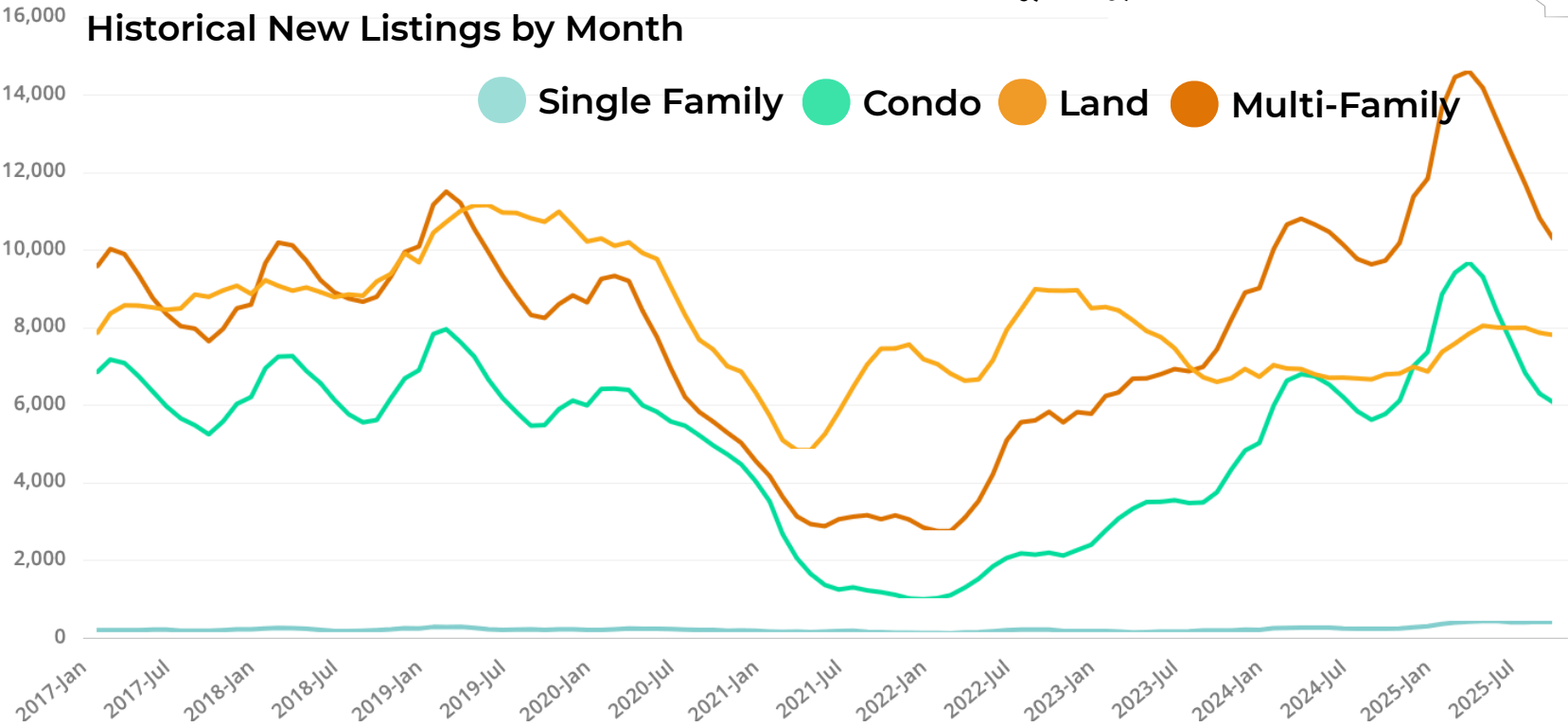
September



September Inventory of
Homes for Sale
SFH+Condo



Historical New Listings by Month



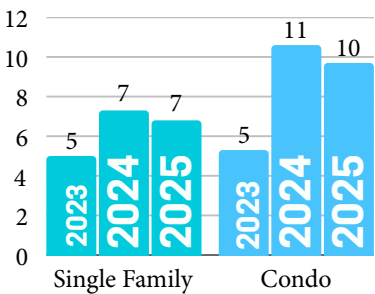
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Months Supply of Inventory

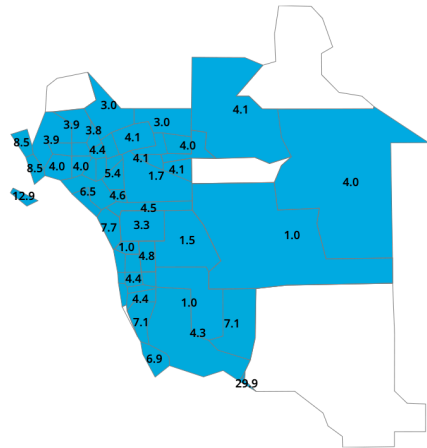
The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.



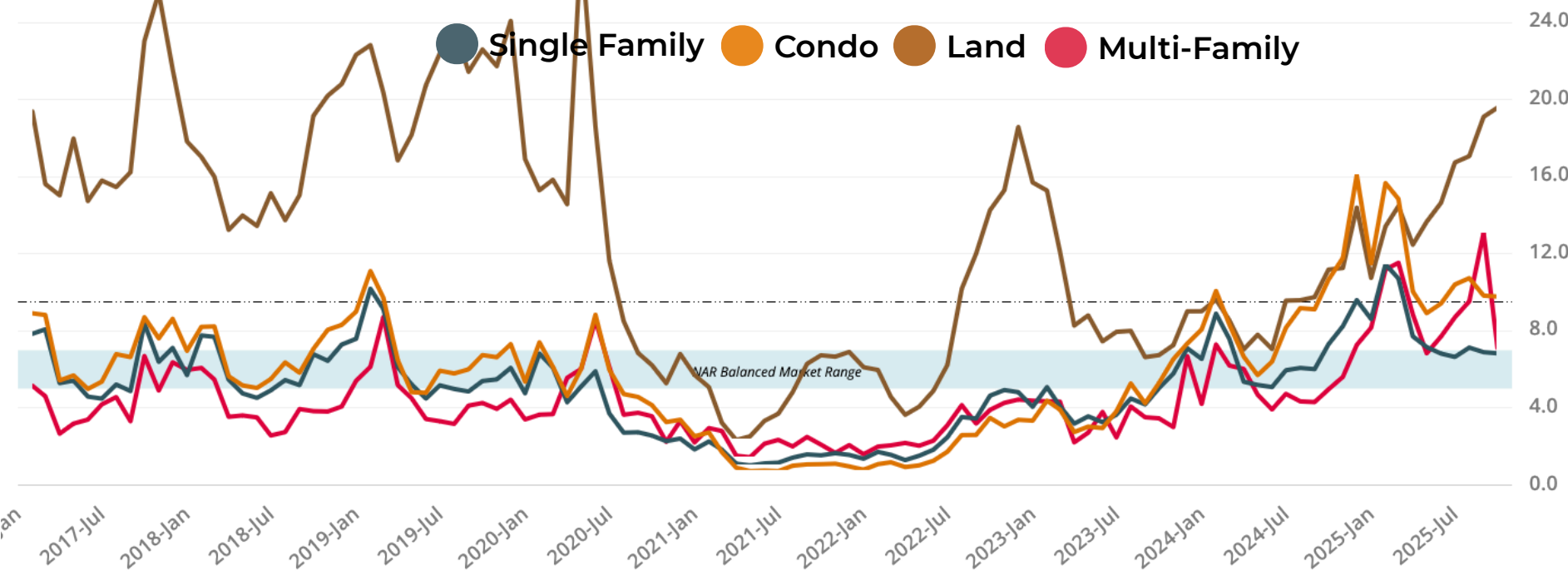
September



September Months
Supply of Inventory
SFH+Condo



Historical New Listings by Month



Current as of October 10th, 2025. All data from Bonita Springs-Estero Board of Realtors® MLS.

Southwest Florida (Lee, Collier, Hendry)

Key metrics by report month and for year-to-date (YTD) starting from the first of the year. PropertyTypes: Single Family, Condo, Townhome & Multi-Family



Key Metrics	Historical Graph	9-2024	9-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		4,944	4,838	-2.14%	52,344	53,710	2.61%
Pending Sales		2,962	3,393	14.55%	24,700	22,764	-7.84%
Closed Sales		2,536	2,588	2.05%	29,650	26,759	-9.75%
Days on Market (Median)		50	68	36.00%	46	59	28.26%
Median Sales Price		\$350,000	\$365,000	4.29%	\$370,000	\$367,490	-0.68%
Sold Dollar Volume		\$1,227,886,738	\$1,477,958,260	20.37%	\$16,691,574,960	\$16,041,798,821	-3.89%
Percent of List Price Received		95.00%	94.20%	-0.84%	95.20%	94.40%	-0.84%
Inventory of Homes for Sale		22520	24,557	9.05%			
Months Supply of Inventory		8.9	9.5	6.74%			

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