

# Monthly Indicators



## December 2025

December 2025 closed out with stronger buyer momentum heading into peak season, even as the market stayed choice-rich and negotiation-minded. Closed sales increased to 2,879 (+6.7% year over year) and pending sales climbed to 3,103 (+28.1%), pointing to a healthier near-term pipeline. New listings totaled 4,644 (-14.3%), while overall active inventory was essentially unchanged at 26,527 (+0.5%). Pricing held up well: the all-property median sale price rose to \$373,083 (+11.3%), but transactions continued to take longer with median days on market at 57 (+12.5%). Sellers also gave a bit more room on price, with percent of list price received around 94.4%, roughly 0.3 points lower than last December.

By property type, December's demand gains were broad but the supply picture varied. Single-family posted 1,632 closed sales (+18.4%) and 1,720 pending (+35.2%) with a \$460,000 median price (+2.2%); inventory fell to 11,060 (-6.6%) and months of supply improved to about 6.8 (down from roughly 8.6 last year). Condo/townhouse activity was also stronger—811 closed (+26.3%) and 892 pending (+37.7%)—though pricing softened to a \$355,000 median (-6.6%), with inventory near flat at 7,409 (+0.5%) and months of supply around 9.1 (down from roughly 11.5). Land remained the most buyer-leaning segment, with 395 closings (-38.3%) alongside inventory growth to 7,646 (+11.3%), pushing months of supply to about 19.4 (up sharply from roughly 10.7).

## Quick Facts

**+6.7%**

Change in Closed Sales All Properties

**+11.3%**

Change in Median Sales Price All

**+0.5%**

Change in Homes for Sale All Properties

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Bonita Springs-Estero

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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	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		2,745	2,334	-15.0%	34,482	35,615	+3.3%
Pending Sales		1,272	1,720	+35.2%	22,894	23,142	+1.1%
Closed Sales		1,378	1,632	+18.4%	18,758	19,528	+4.1%
Days on Market (Median)		50	53	+6.0%	49	57	+18.4%
Median Sales Price		\$450,000	\$460,000	+2.2%	\$449,595	\$435,700	-3.1%
Percent of List Price Received		1.0%	1.0%	-0.5%	1.0%	1.0%	-0.6%
Inventory of Homes for Sale		11,842	11,060	-6.6%			
Months Supply of Inventory		9	7	-21.1%			

# Condo Market Overview



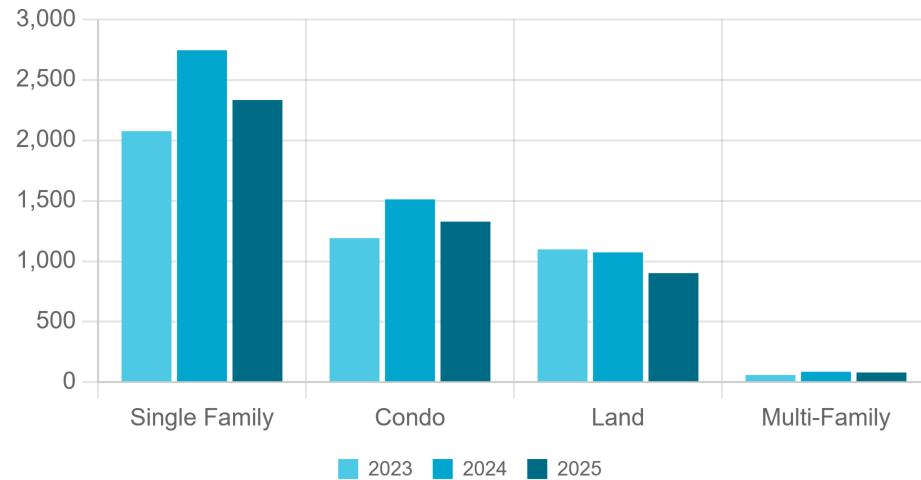
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Condo properties only.

Key Metrics	Historical Graph	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		1,512	1,328	-12.2%	18,504	18,950	+2.4%
Pending Sales		648	892	+37.7%	11,343	11,030	-2.8%
Closed Sales		642	811	+26.3%	8,789	8,785	-0.0%
Days on Market (Median)		56	62	+10.7%	58	75	+29.5%
Median Sales Price		\$380,000	\$355,000	-6.6%	\$397,333	\$360,104	-9.4%
Percent of List Price Received		0.9%	0.9%	-0.6%	1.0%	0.9%	-1.1%
Inventory of Homes for Sale		7,372	7,409	+0.5%			
Months Supply of Inventory		11	9	-20.4%			

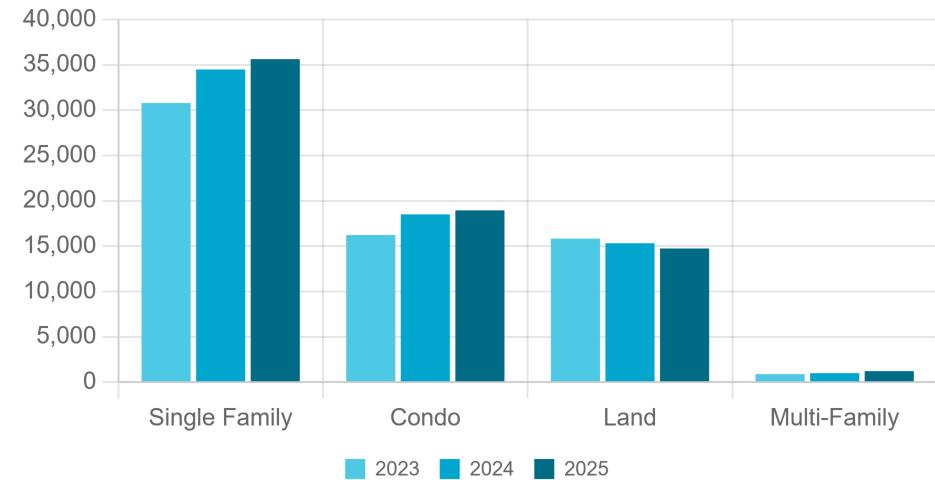
# New Listings

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

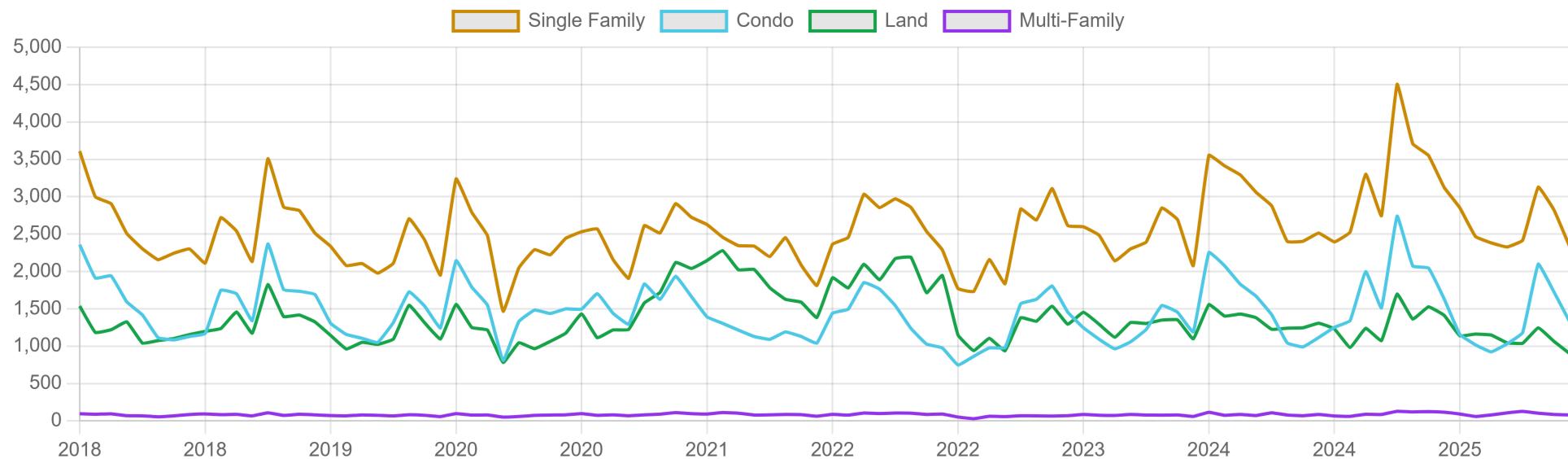
## December



## Year to Date



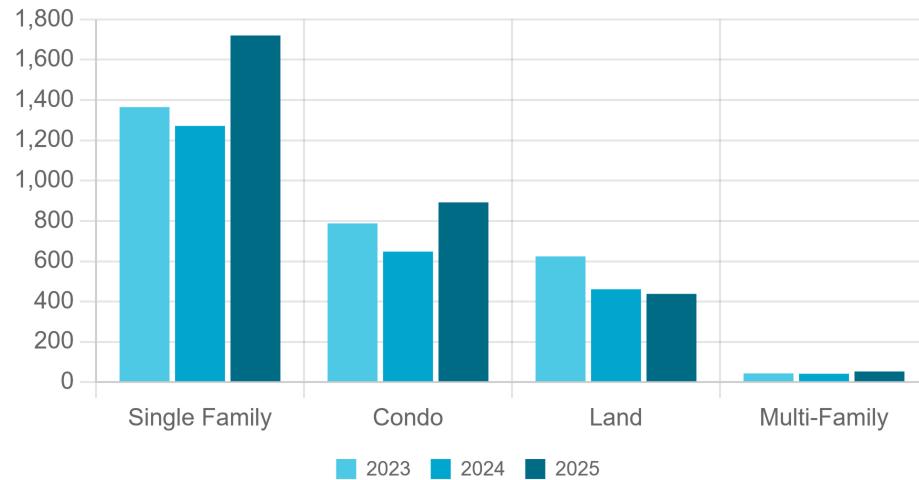
## New Listings by Month



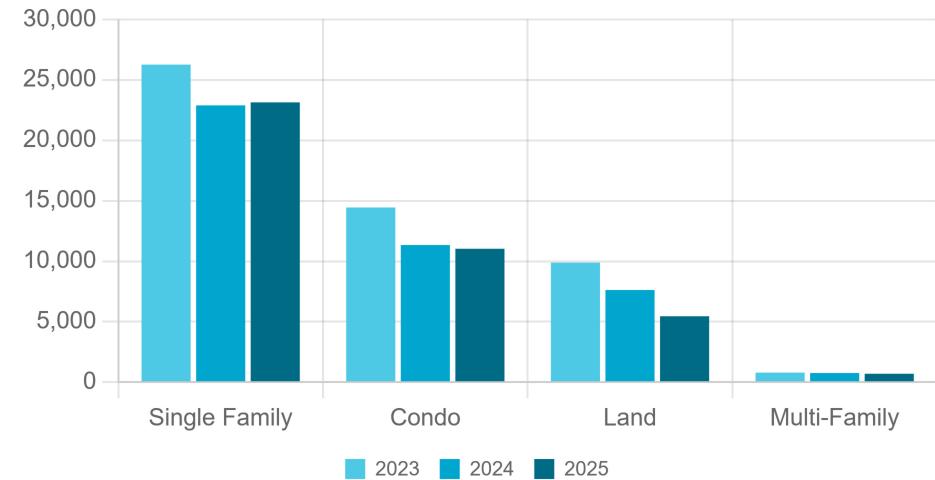
# Pending Sales

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

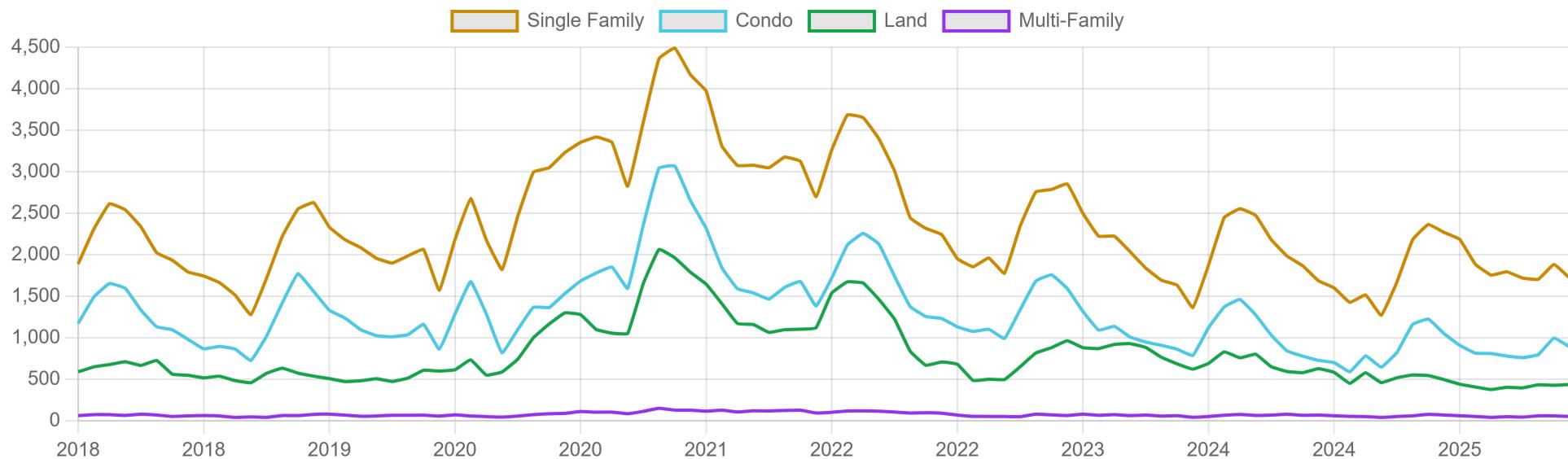
## December



## Year to Date



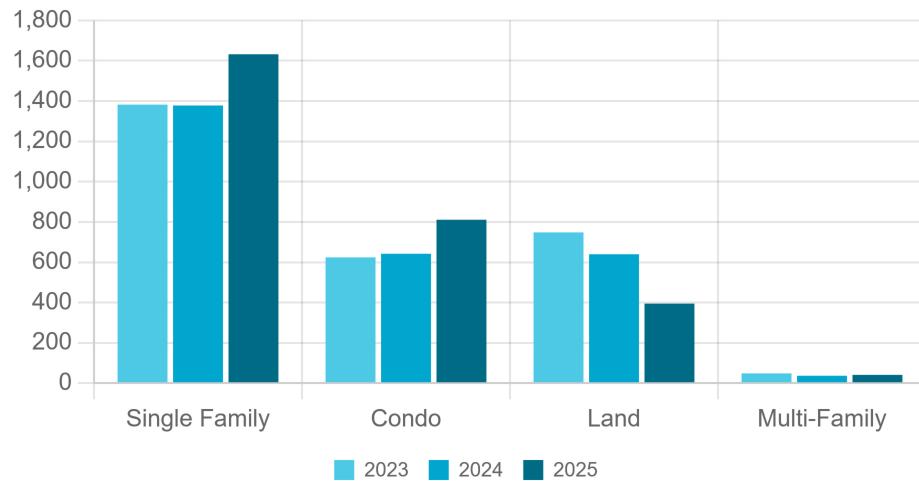
## Pending Sales by Month



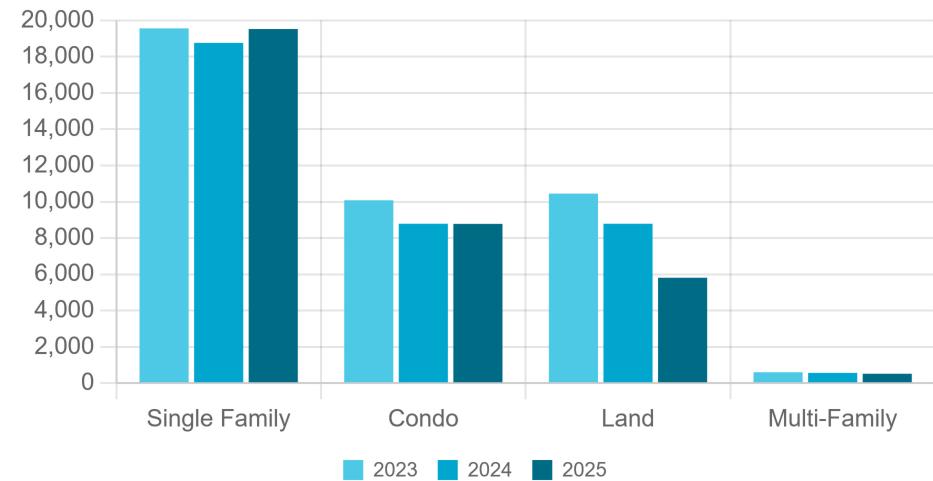
# Closed Sales

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

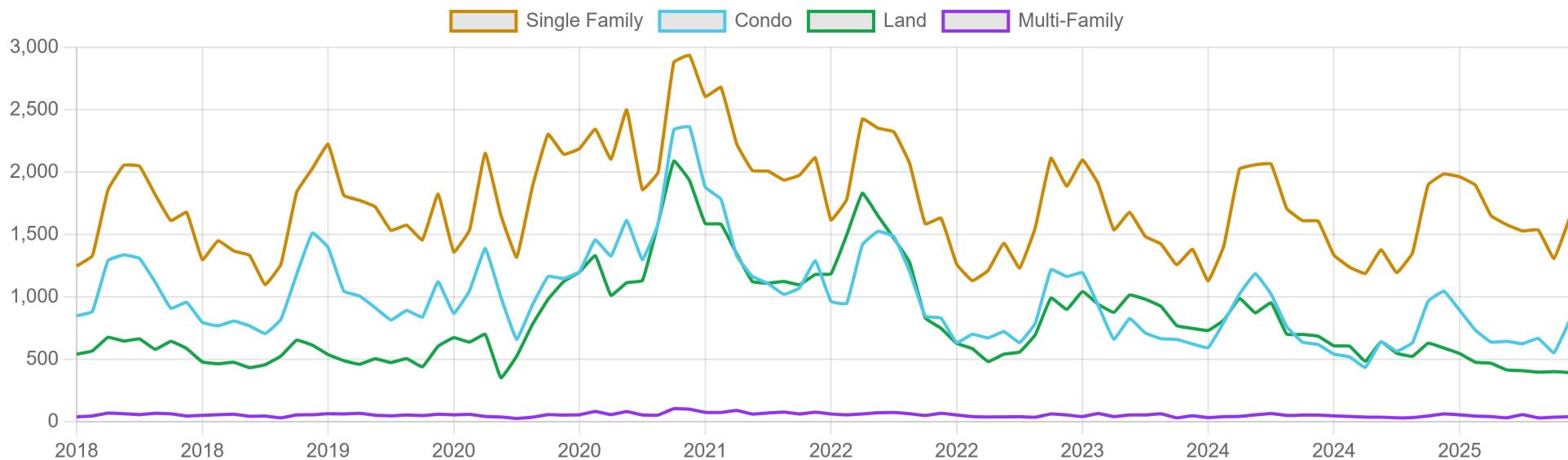
## December



## Year to Date



## Closed Sales by Month

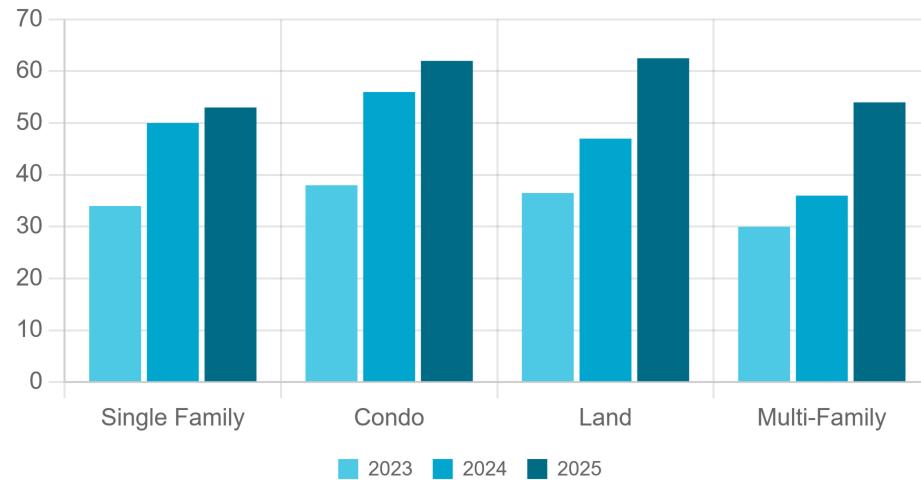


# Days on Market (Median)

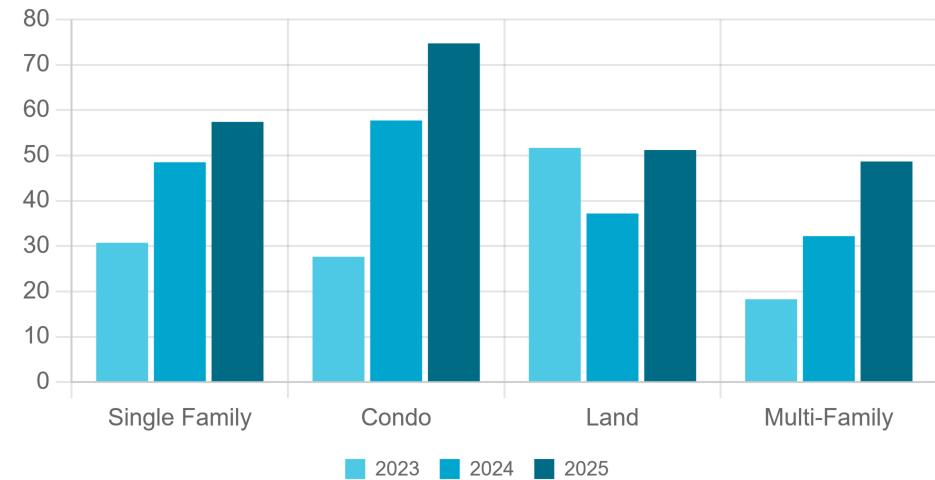


Average number of days between when a property is listed and when an offer is accepted in a given month.

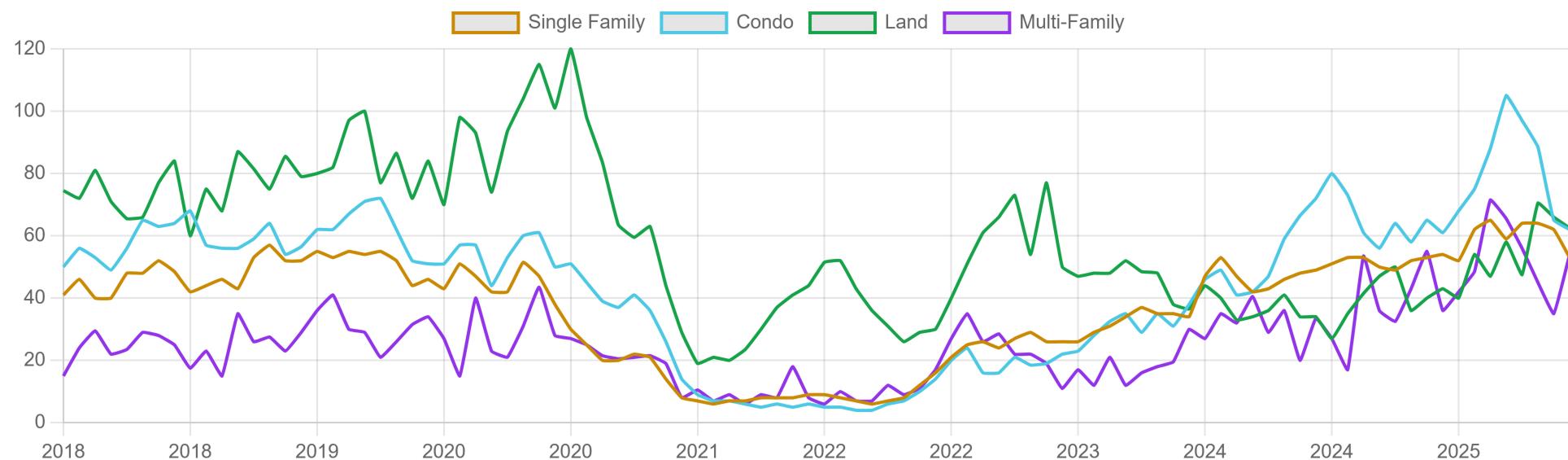
## December



## Year to Date



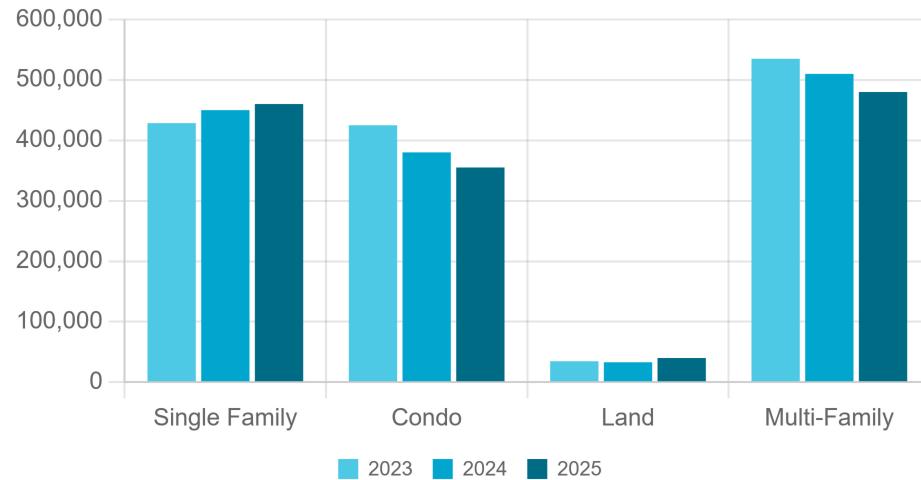
## Days on Market (Median) by Month



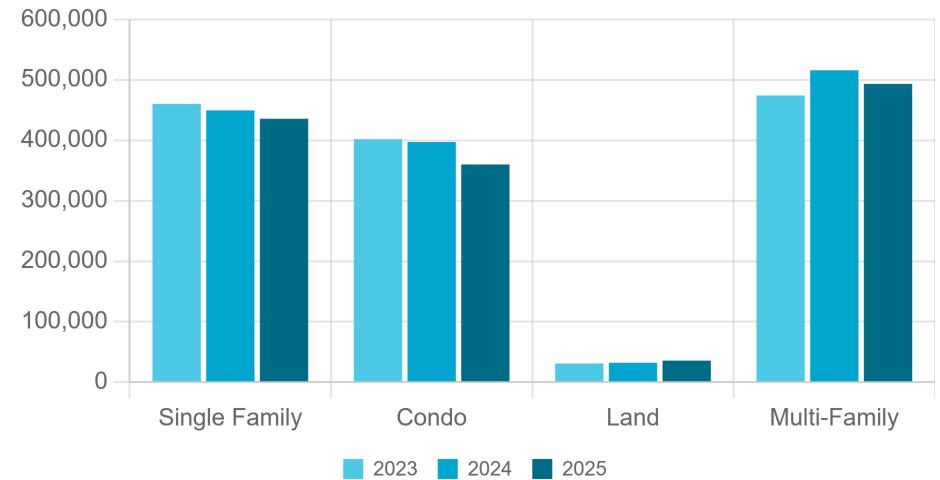
# Median Sales Price

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

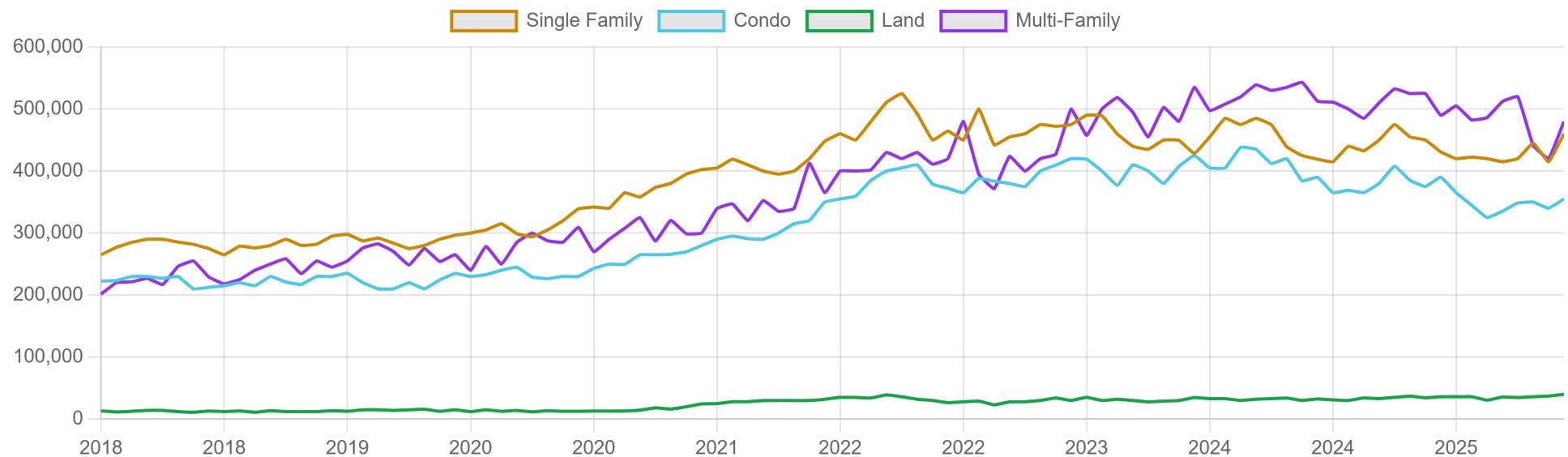
## December



## Year to Date



## Median Sales Price by Month

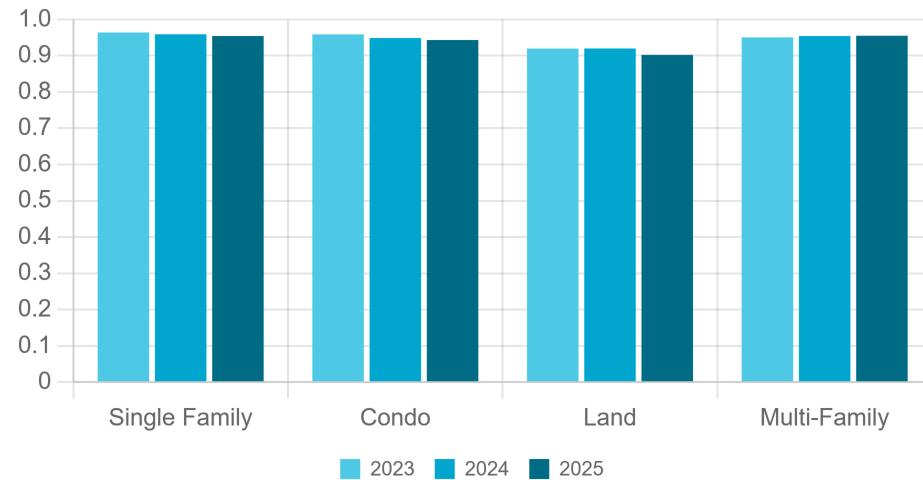


# Percent of List Price Received

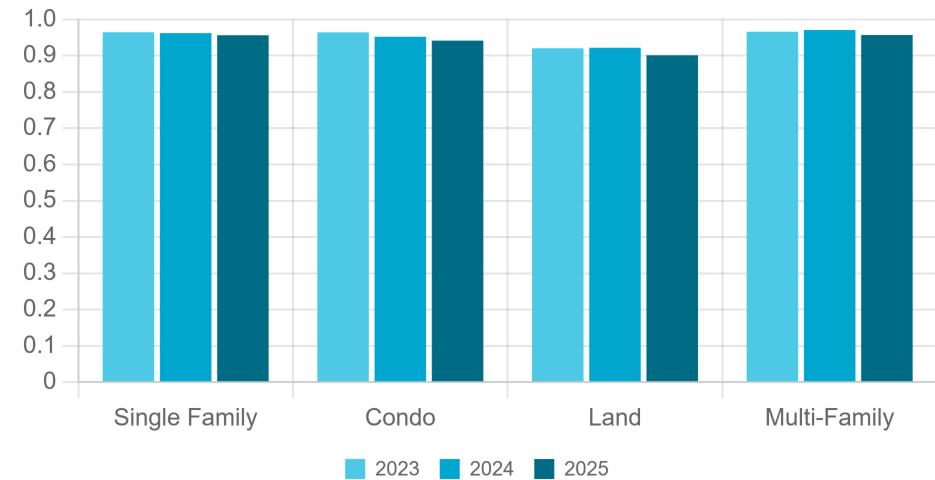


Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.

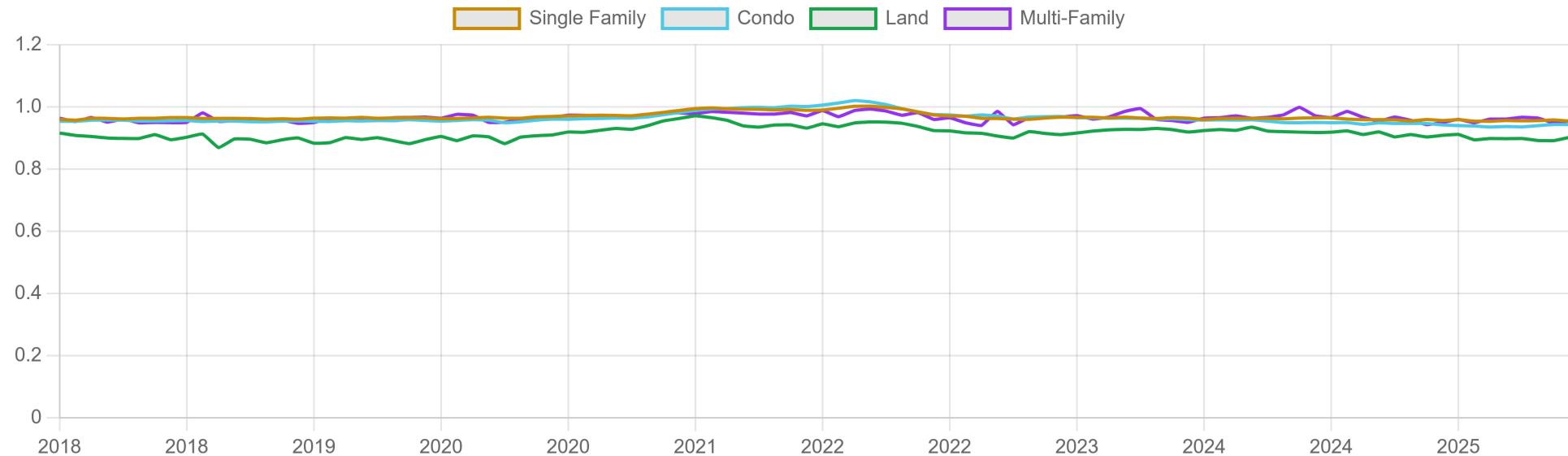
## December



## Year to Date



## Percent of List Price Received by Month

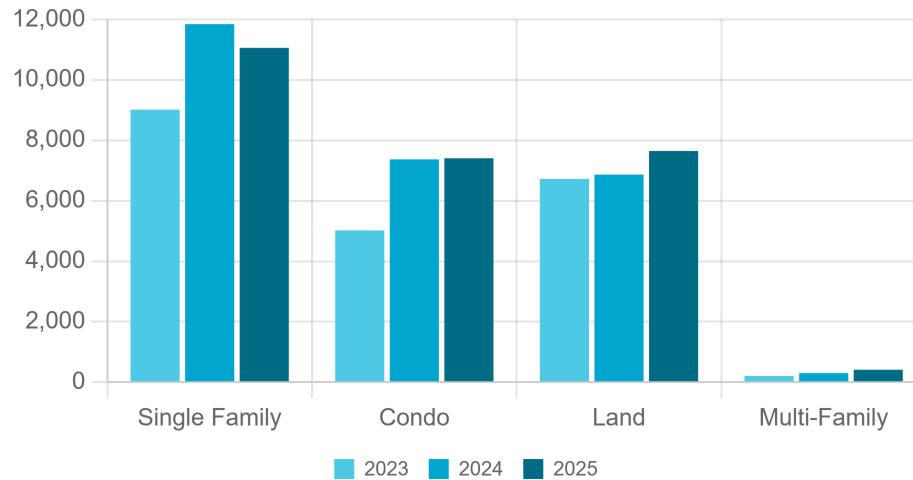


# Inventory of Homes for Sale

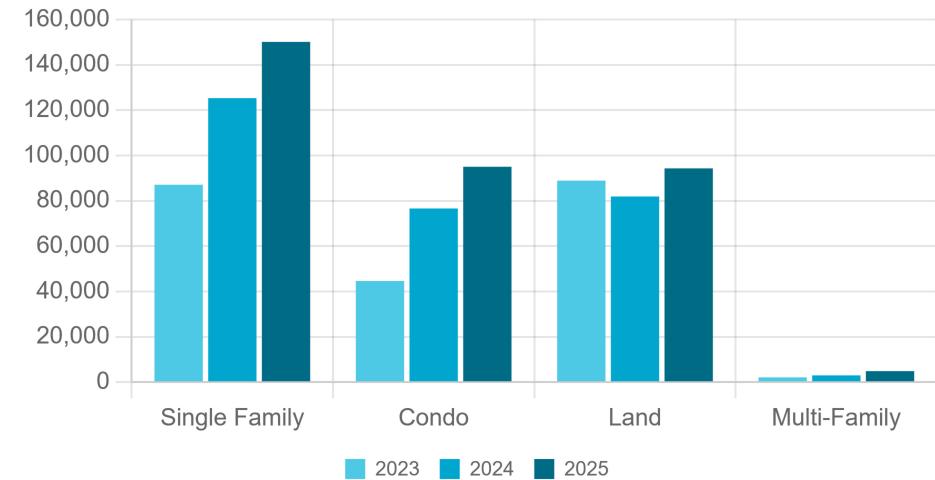


The number of properties available for sale in active status at the end of a given month.

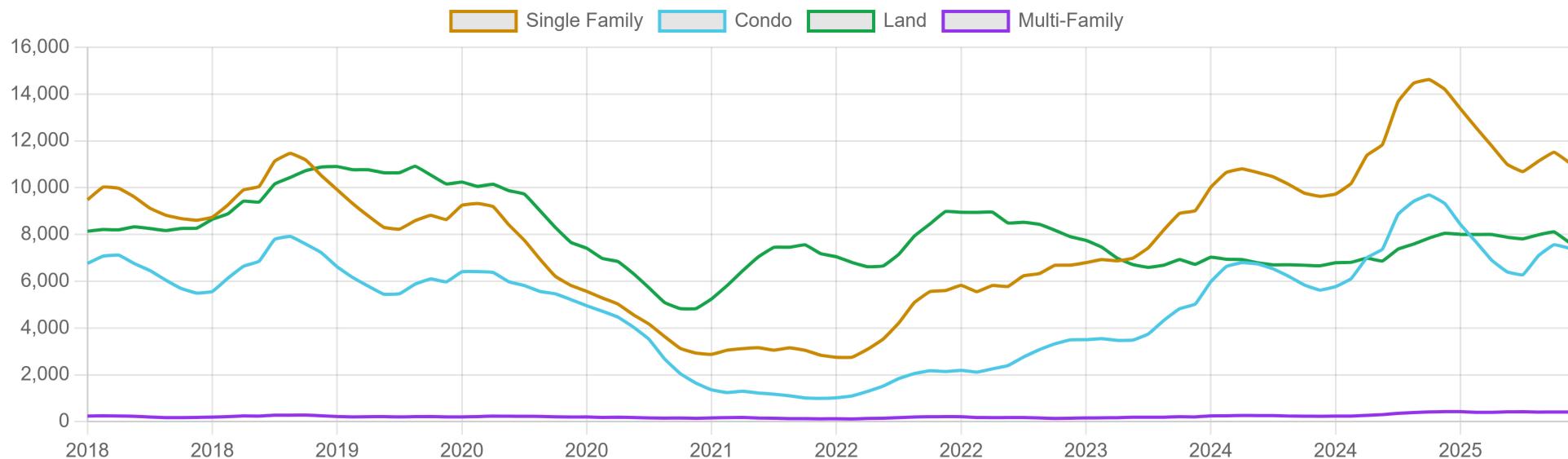
## December



## Year to Date



## Inventory of Homes for Sale by Month

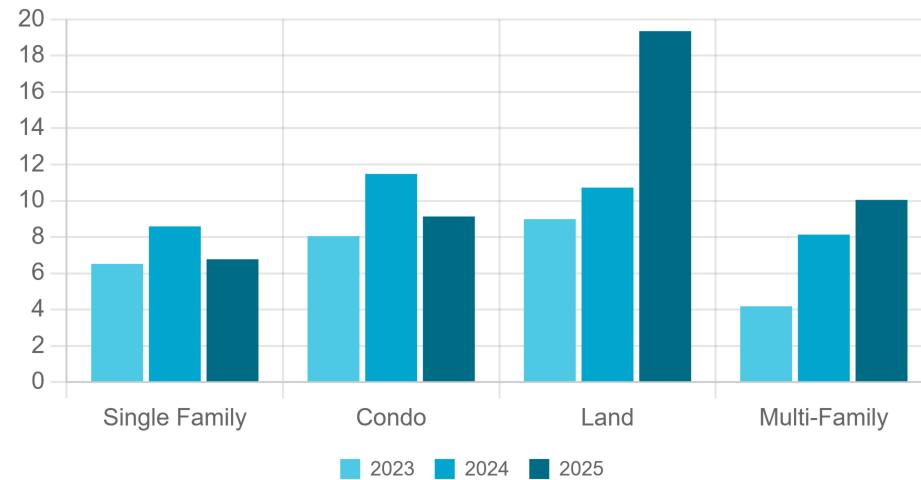


# Months Supply of Inventory

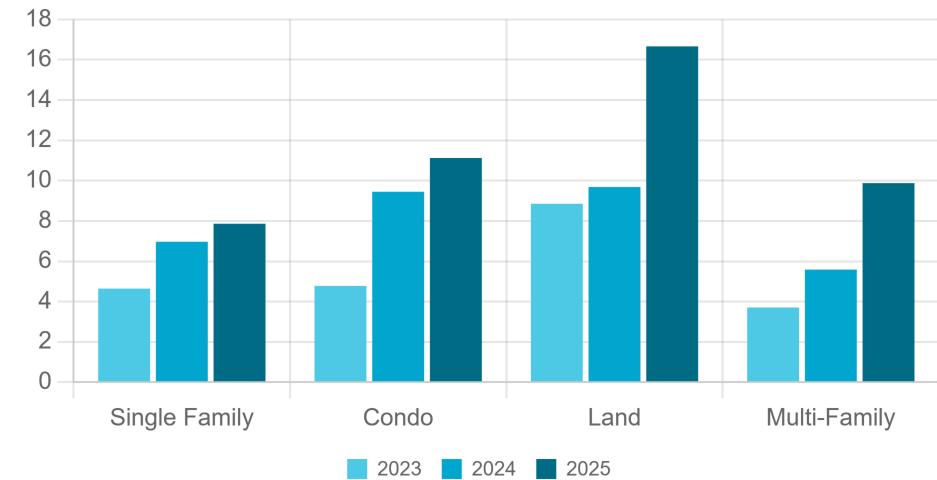


The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.

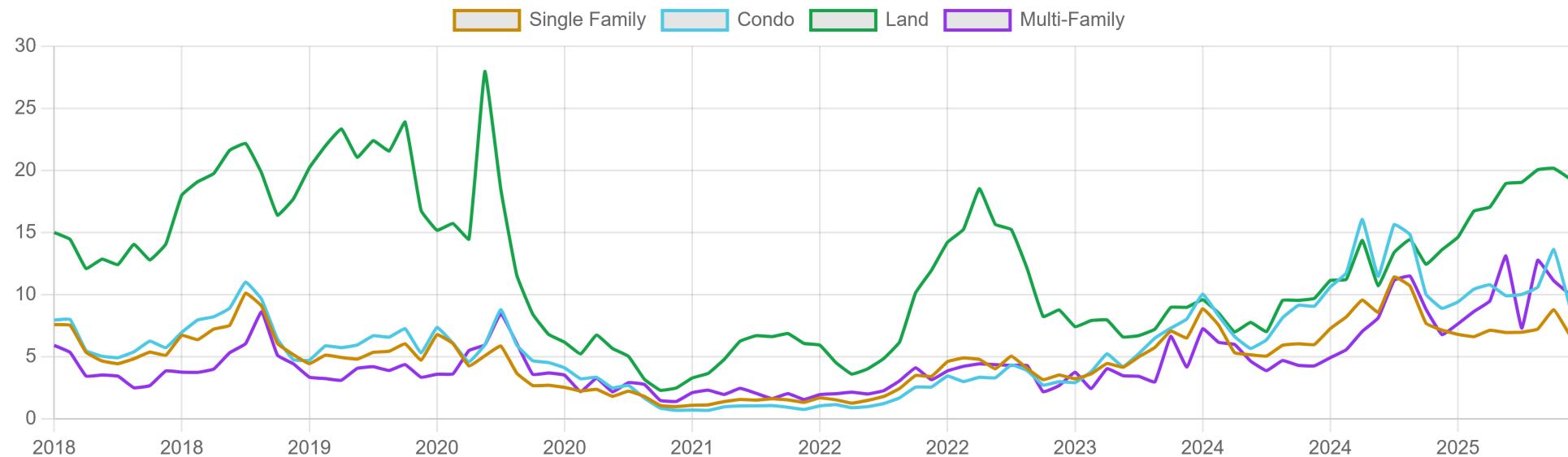
## December



## Year to Date



## Months Supply of Inventory by Month



# Southwest Florida (Lee, Collier, Hendry)



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

Key Metrics	Historical Graph	12-2024	12-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		5,417	4,644	-14.3%	69,299	70,537	+1.8%
Pending Sales		2,423	3,103	+28.1%	42,625	40,316	-5.4%
Closed Sales		2,697	2,879	+6.7%	36,905	34,644	-6.1%
Days on Market (Median)		51	57	+12.5%	47	60	+27.3%
Median Sales Price		\$335,206	\$373,083	+11.3%	\$338,099	\$349,615	+3.4%
Percent of List Price Received		0.9%	0.9%	-0.3%	1.0%	0.9%	-0.8%
Inventory of Homes for Sale		26,382	26,527	+0.5%			
Months Supply of Inventory		10	11	+11.7%			