

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	12

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

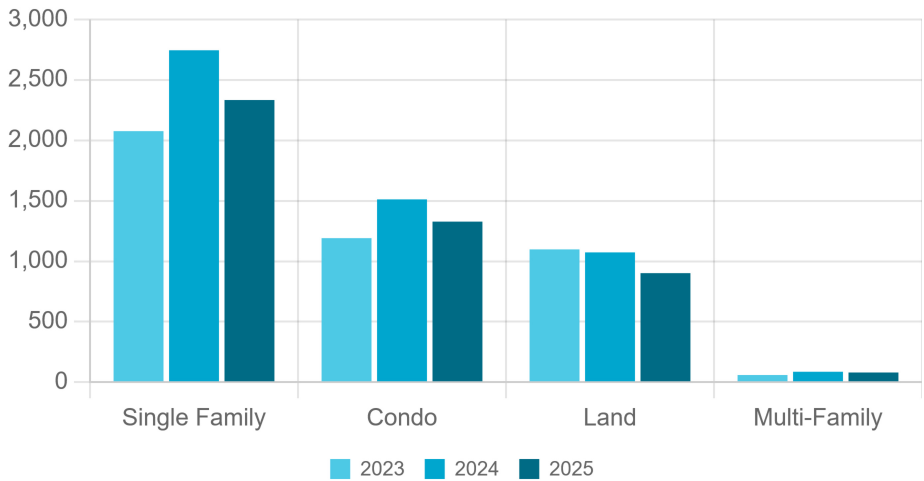
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Condo properties only.

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%			

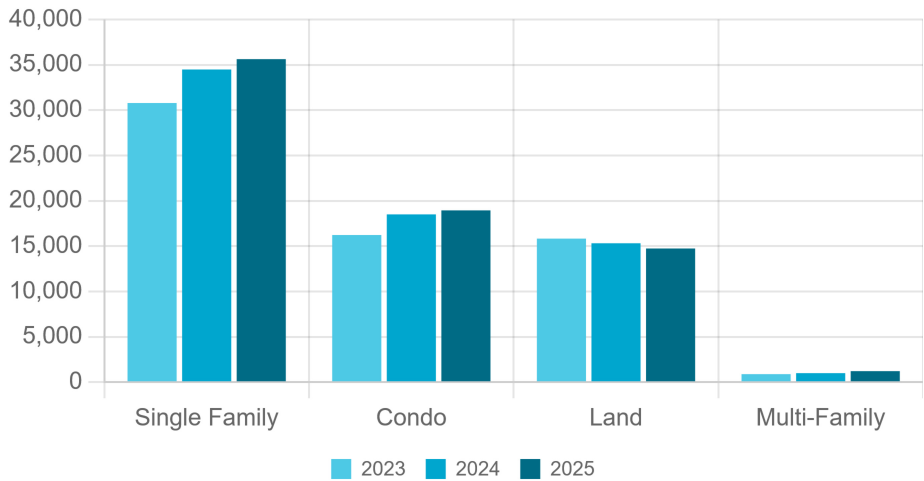
New Listings

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

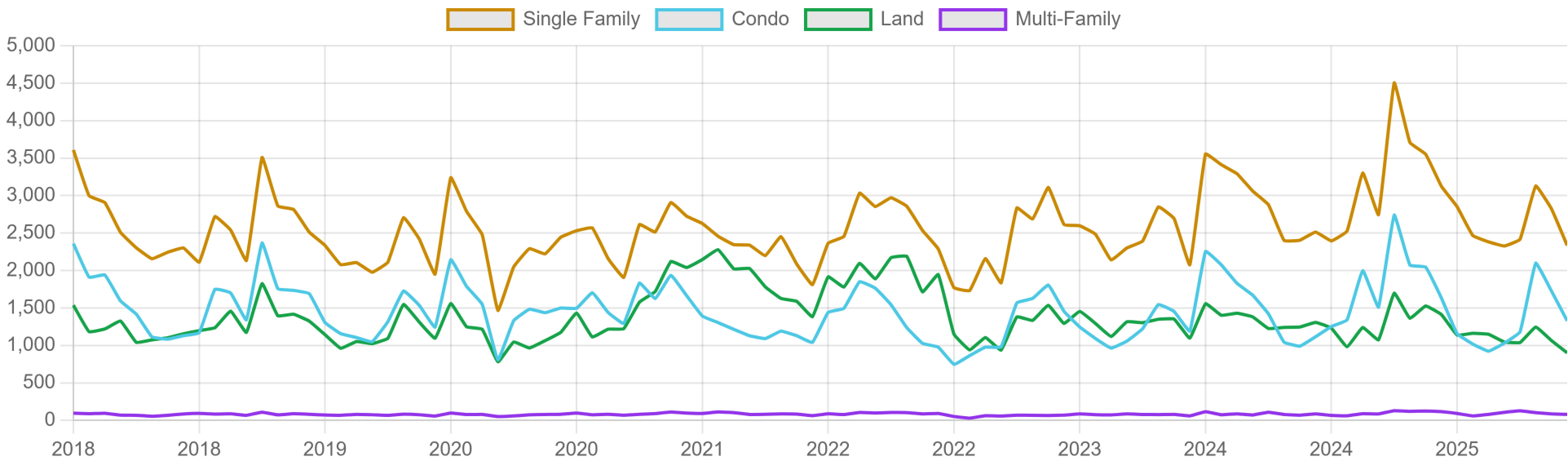
December



Year to Date



New Listings by Month

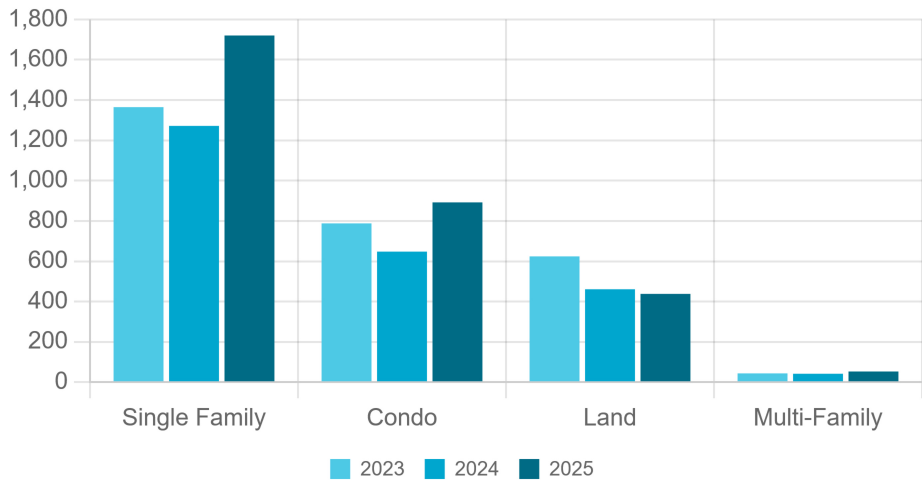


Pending Sales

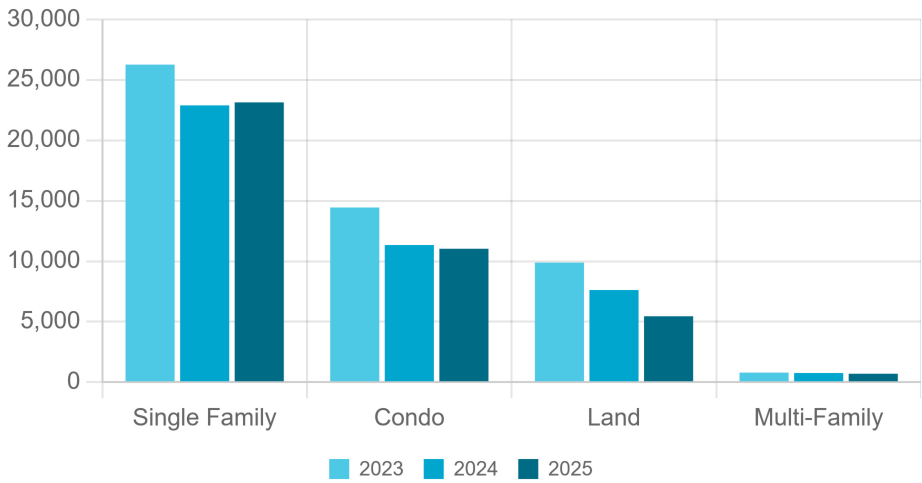


A count of the properties on which offers have been accepted in a given month.

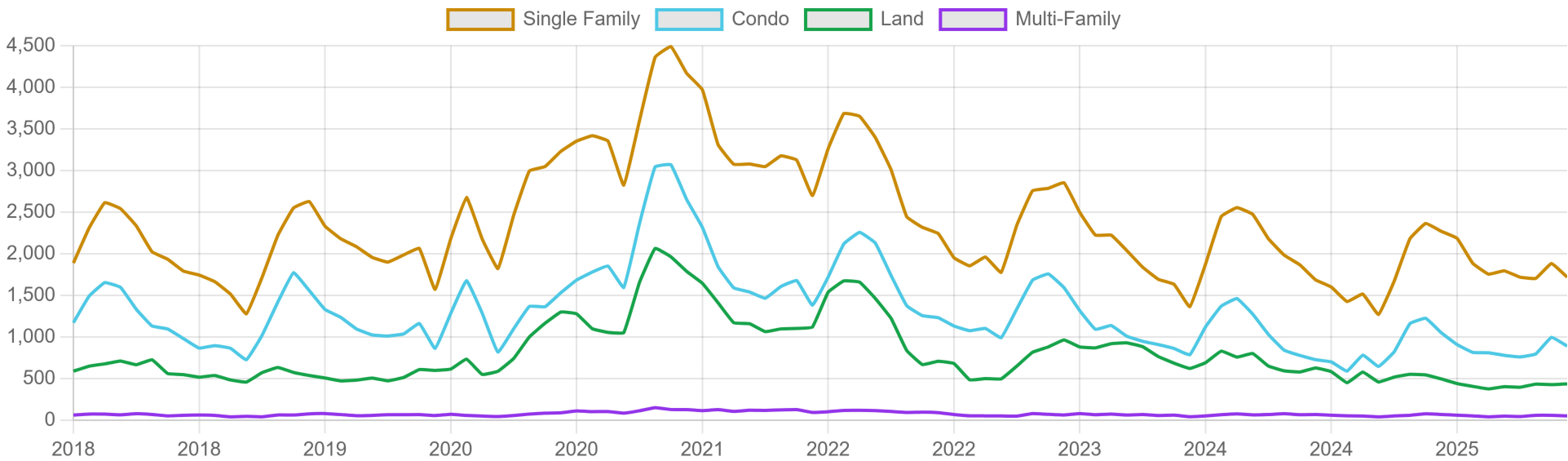
December



Year to Date



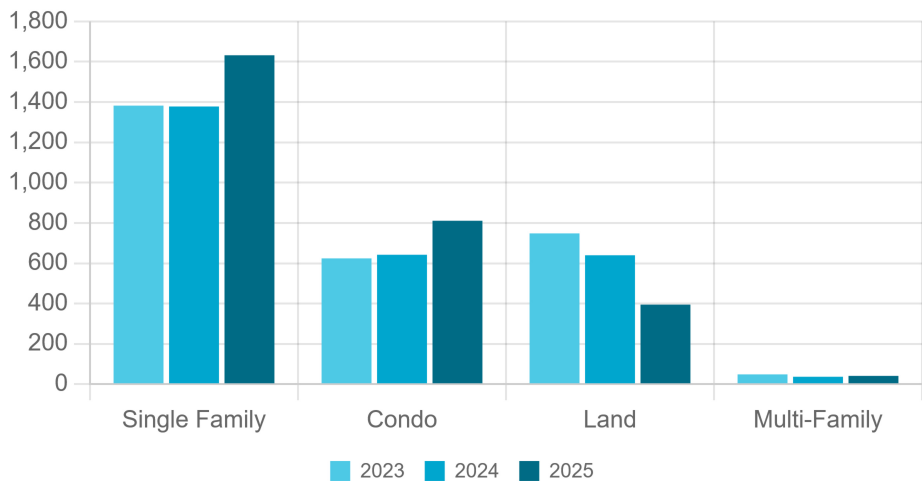
Pending Sales by Month



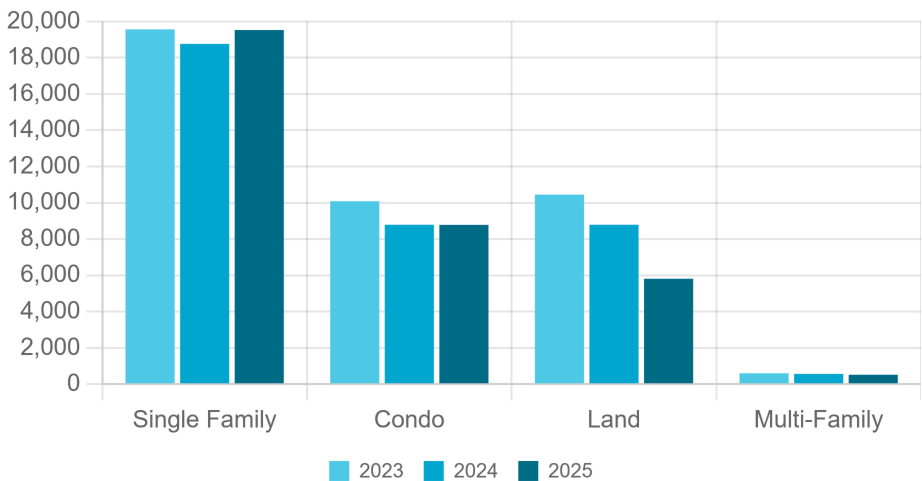
Closed Sales

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

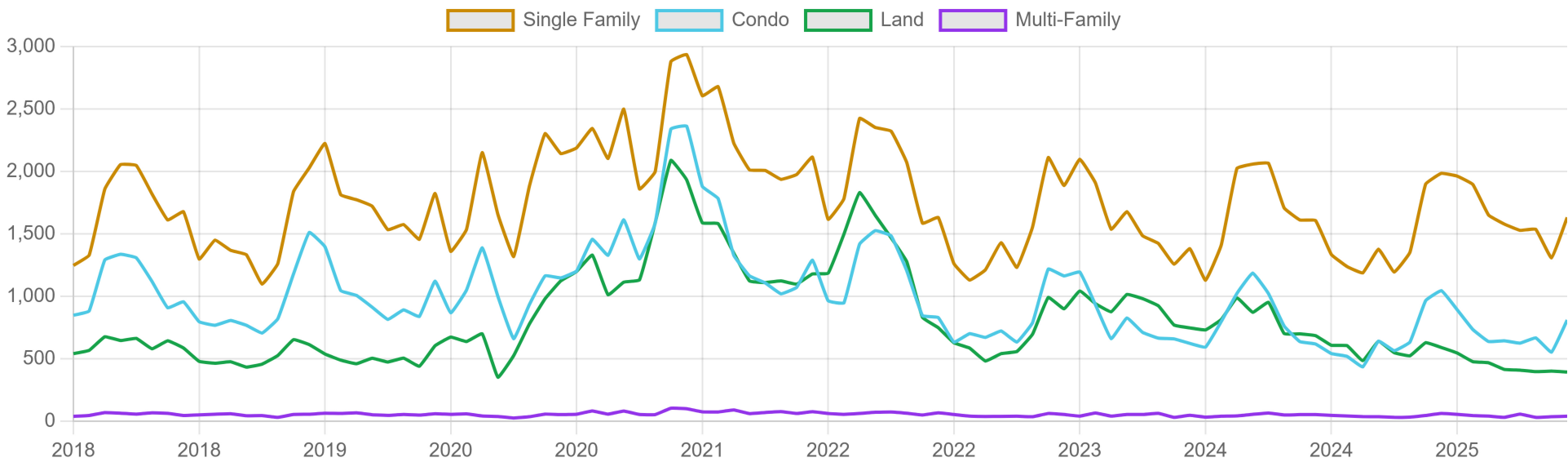
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Year to Date



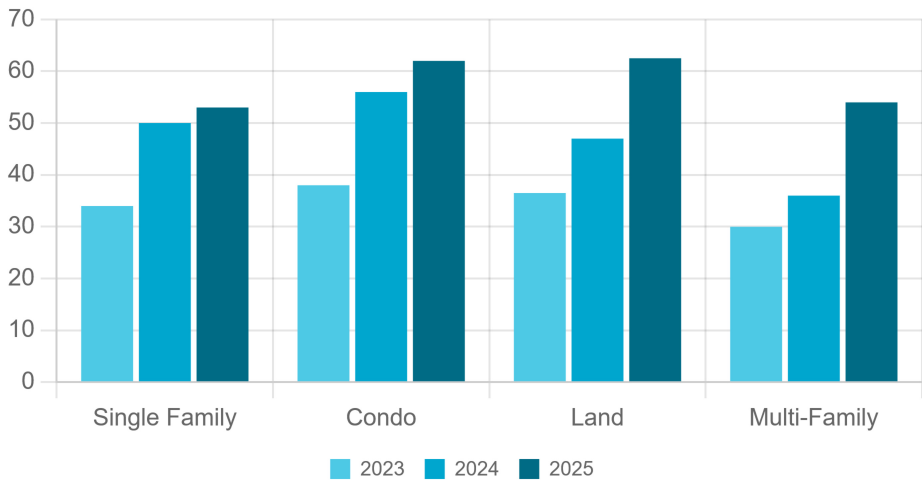
Closed Sales by Month



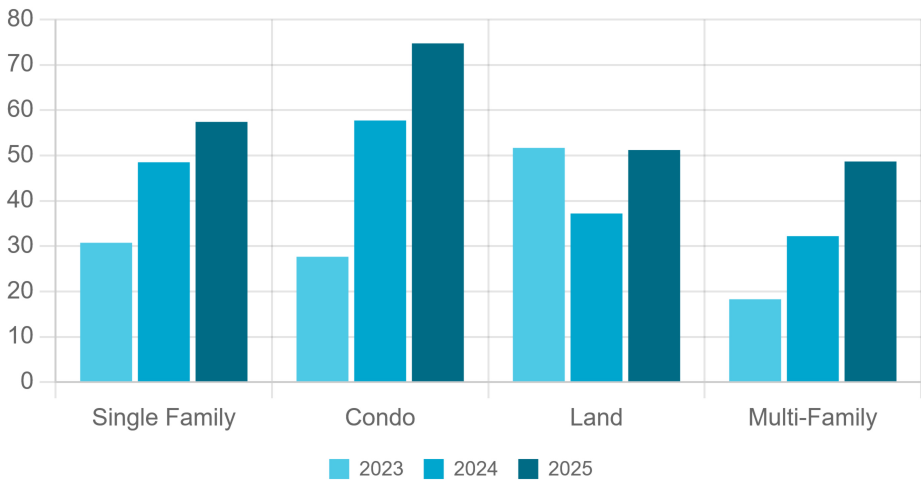
Days on Market (Median)

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

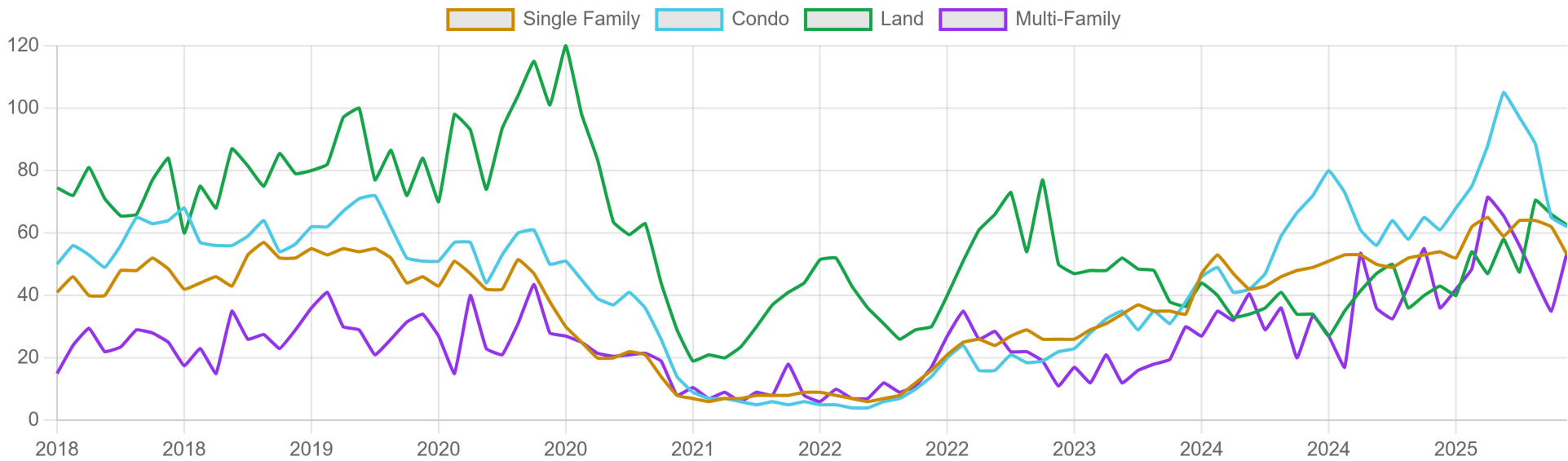
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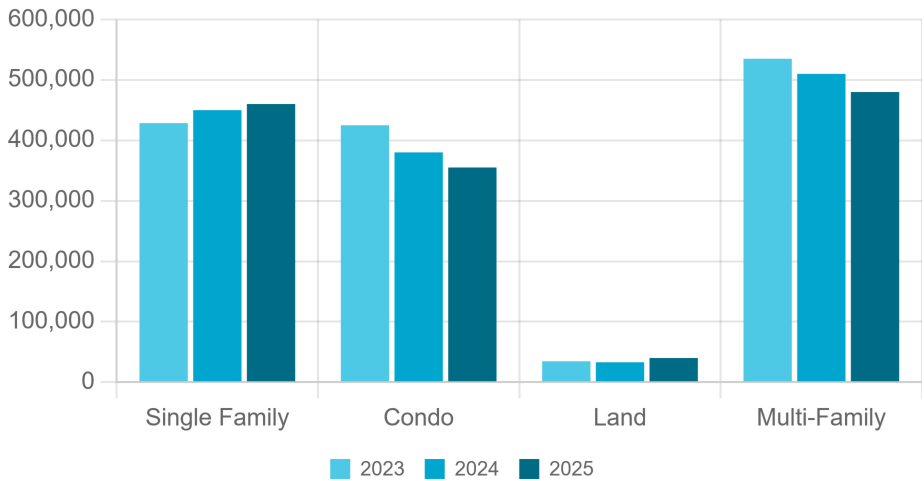
Days on Market (Median) by Month



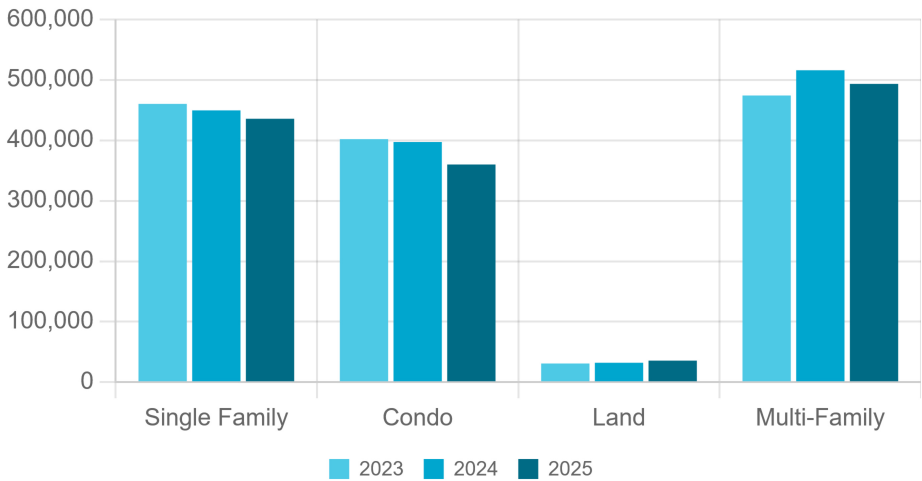
Median Sales Price

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

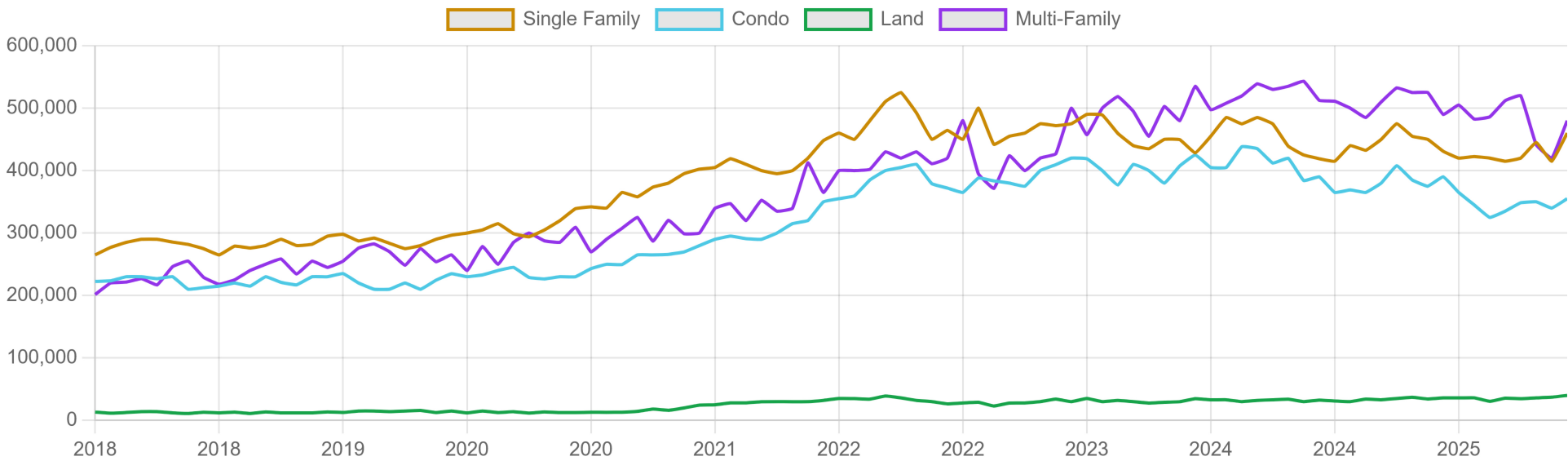
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Year to Date



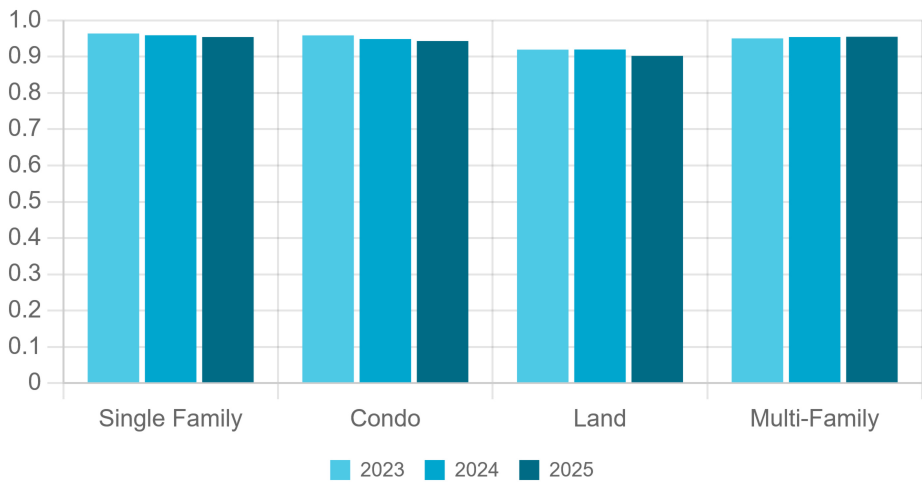
Median Sales Price by Month



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.

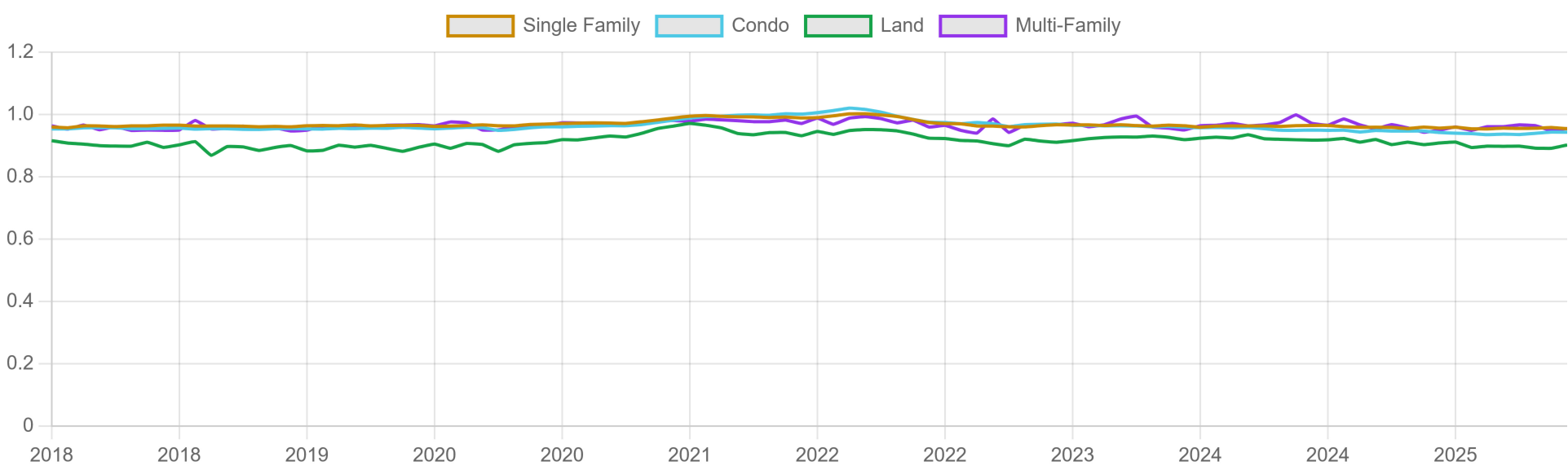
December



Year to Date



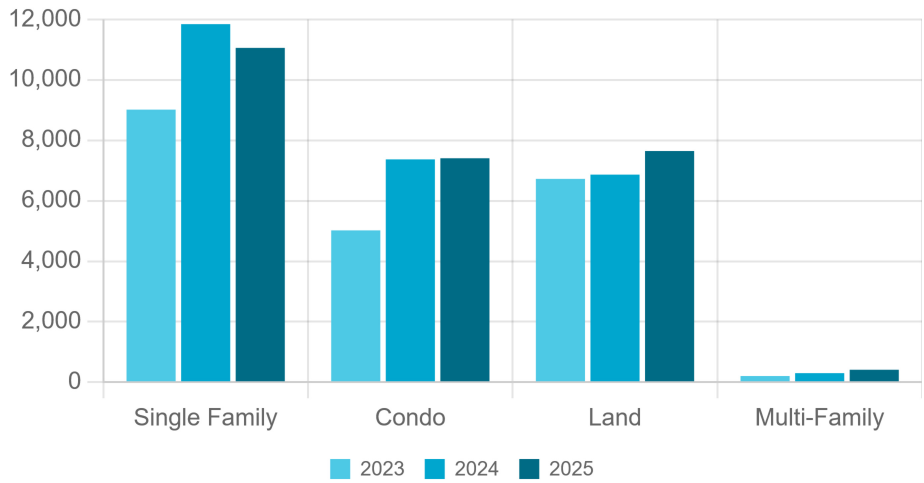
Percent of List Price Received by Month



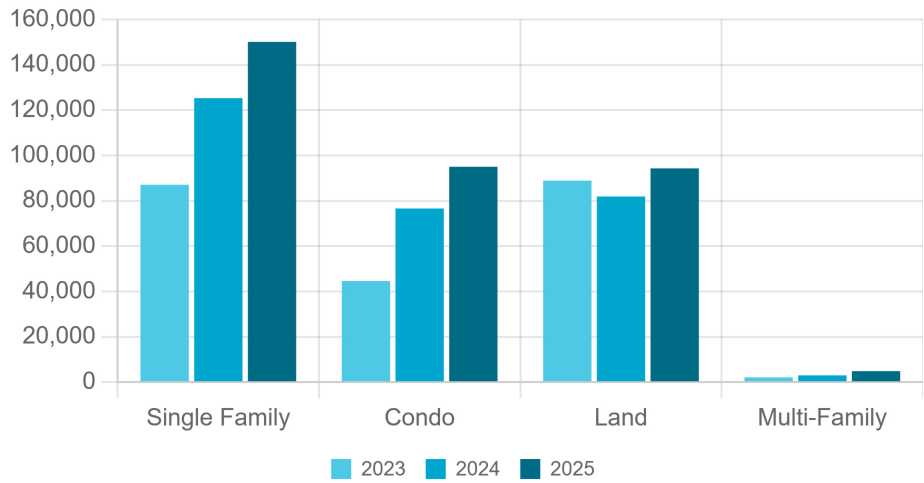
Inventory of Homes for Sale

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

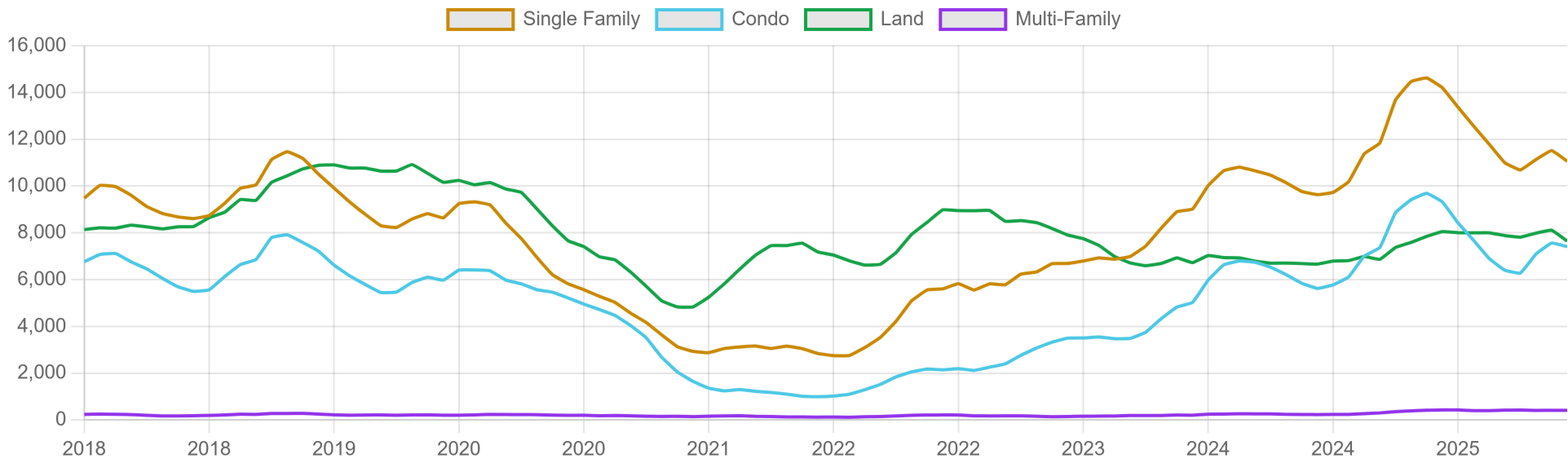
December



Year to Date



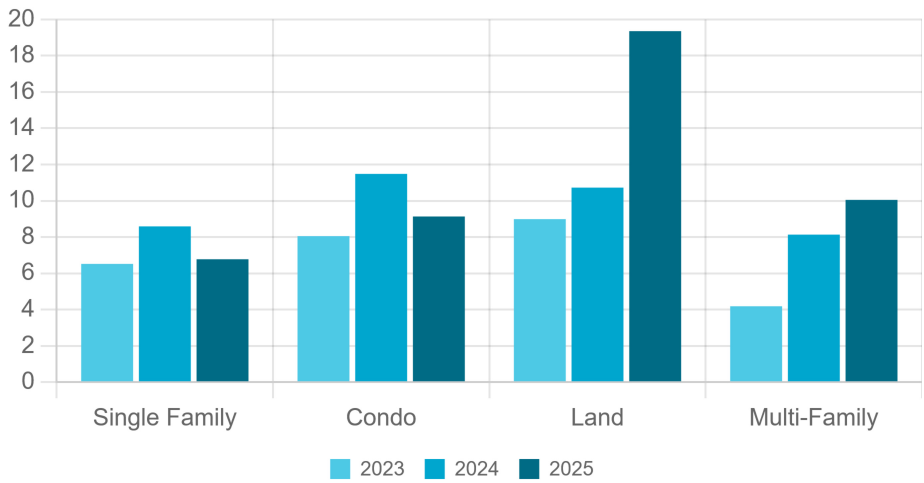
Inventory of Homes for Sale by Month



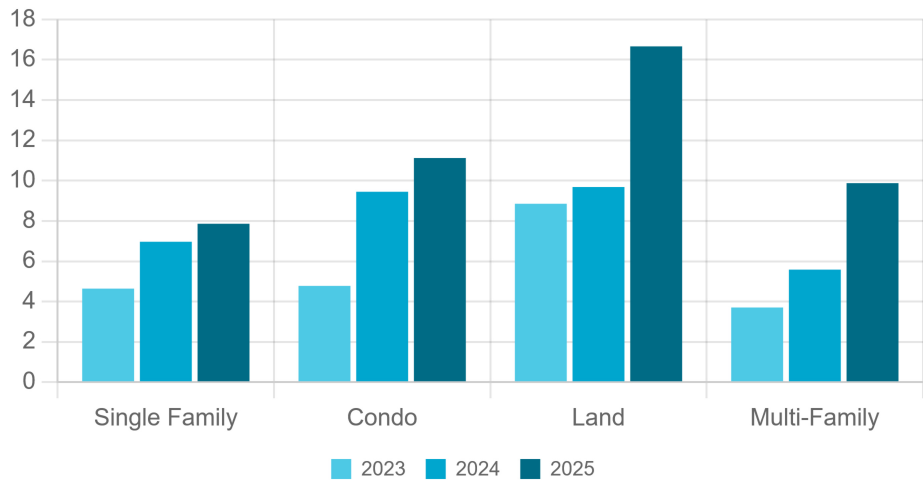
Months Supply of Inventory

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.

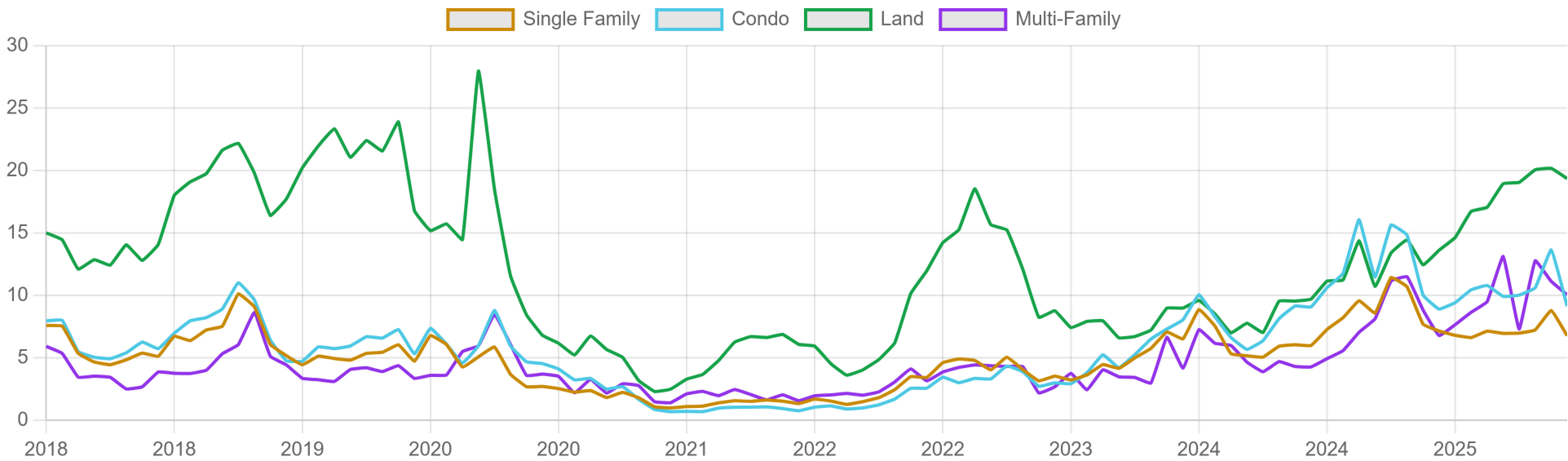
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Year to Date



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. PropertyTypes: 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%			