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REALTOR® Association of Sarasota and Manatee

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November 2025 Real Estate Market Report: Trends in Sarasota and Manatee Counties

SARASOTA, Fla. (December 19, 2025) – The REALTOR® Association of Sarasota and Manatee (RASM) has released its November 2025 real-estate market report, providing a snapshot of market conditions across the two counties. According to data from Florida REALTORS®, November's housing market showed divergent trends between single-family homes and condos/townhouses and between the two counties.

November's data highlights the need to evaluate each segment of the housing market on its own. While Sarasota experienced a notable increase in single-family home sales alongside softer condo activity, Manatee County showed the opposite trend. These contrasting patterns reinforce the value of working with local real estate professionals who understand the nuances of each market and can help buyers and sellers navigate shifting conditions.

Key Trends in Sarasota/Manatee November 2025:

- **Sales Activity:** Sarasota County posted a 28.5 percent year-over-year increase in single-family home sales, while its townhouse/condo segment slipped 3.4 percent. Manatee County saw the opposite pattern: single-family sales fell 13.7 percent, but condo/townhouse sales grew 16.0 percent.
- **Median Sales Price:** Sarasota's median sale prices declined for both property types. In Manatee County, the median price for single-family homes jumped 13.3 percent, while condo prices remained almost consistent year-over-year.
- **Inventory:** Active listings rose in most segments. Sarasota condos reached an 8.1-month supply of inventory, while Manatee condos stood at 6.5 months. Sarasota single-family homes had the leanest inventory at 4.8 months.
- **Speed of Sales:** Homes generally took longer to sell compared with last year. Manatee condos saw the biggest increase in time to contract and time to sale. Sarasota single-family metrics were relatively stable.

Single-Family Homes

In November 2025, Sarasota County reported 564 closed sales for single-family homes, a 28.5 percent increase year-over-year. The median sale price declined 6.6 percent to \$457,495, continuing a gradual

normalization from last year. Cash buyers made up 42.7 percent of all closed sales, while sellers received a median of 93.3 percent of their original list price.

Inventory in Sarasota edged up 0.8 percent year-over-year to 3,245 active listings, while the months supply of inventory decreased to 4.8 months, signaling modest tightening compared to October. Homes took a median of 54 days to go under contract and 94 days to close.

In Manatee County, there were 548 single-family sales, representing a 13.7 percent decline year-over-year, reflecting a slower pace than October. The median sale price increased 13.3 percent to \$487,233, driven in part by a shift in the mix of homes sold. Cash sales accounted for 27.0 percent of transactions, and sellers received 94.5 percent of their original list price.

Active listings in Manatee rose 8.4 percent year-over-year to 2,647 homes, with the months supply holding firm at 4.2 months. Homes spent a median of 59 days to go under contract and 102 days to close.

“Sarasota and Manatee may share a border, but their single-family markets are behaving very differently,” said Debi Reynolds, 2025 RASM President and Managing Broker at SaraBay Real Estate. “That’s why working with a professional who understands local nuances is critical when making major real-estate decisions.”

Townhomes and Condos

In November 2025, Sarasota County recorded 228 closed sales for condos and townhomes, a 3.4 percent year-over-year decrease. The median sale price declined 11.8 percent to \$329,500. Cash buyers accounted for 62.3 percent of all condo transactions, and sellers received 92.0 percent of their original list price.

Active condo inventory in Sarasota rose to 2,203 units, while the months supply settled at 8.1 months. The median time to contract was 61 days, and the median time to sale was 103 days, indicating slightly faster movement than a year ago

Manatee County posted 189 closed sales in the condo and townhome segment, a 16.0 percent year-over-year increase. The median sale price dipped slightly 0.6 percent to \$308,000, while cash sales made up 49.2 percent of all transactions. Sellers received 92.3 percent of their original list price.

Manatee’s condo inventory increased 3.4 percent year-over-year to 1,447 active listings, with the months supply slightly increasing to 6.5 months. Homes took a median of 74 days to go under contract and 115 days to close, underscoring the slower pace and heightened competition among sellers.

“The condo and townhome market is clearly more supply-driven, especially in Sarasota County,” added Reynolds. “Higher inventory levels mean buyers have more leverage, while sellers must be more strategic to remain competitive.”

Summary

November’s figures underscore that there is no single narrative for the Sarasota–Manatee housing market. Conditions vary significantly by county, property type, and even neighborhood, making it essential for buyers and sellers to understand their specific market. REALTORS® play a key role in interpreting these localized trends, helping consumers cut through broad headlines and make confident decisions tailored to their unique goals and circumstances.

Monthly reports are provided by Florida Realtors® with data compiled from Stellar MLS. For comprehensive statistics dating back to 2015, visit www.MyRASM.com/statistics.

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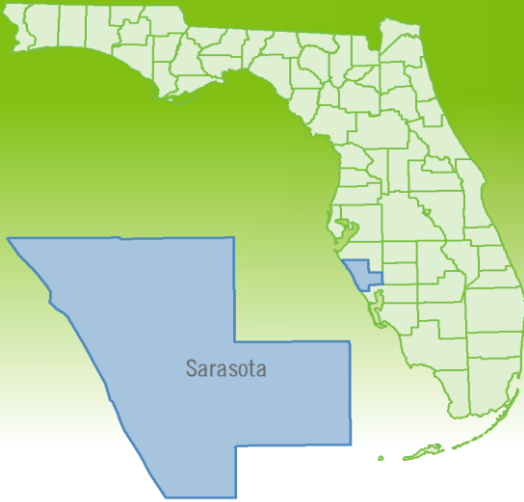
About REALTOR® Association of Sarasota and Manatee

The REALTOR® Association of Sarasota and Manatee (RASM) is the largest real estate trade association in Sarasota and Manatee counties, serving over 9,000 members. RASM provides technology, training, networking, and business support to members, and supports a healthy real estate market by upholding high professional and ethical standards through a Code of Ethics, ongoing education, and certification programs. As the advocate for the real estate brokerage industry, RASM is the Voice for Real Estate® in the Sarasota/Manatee region. For more information, call (941) 952-3400 or visit www.myrasm.com.

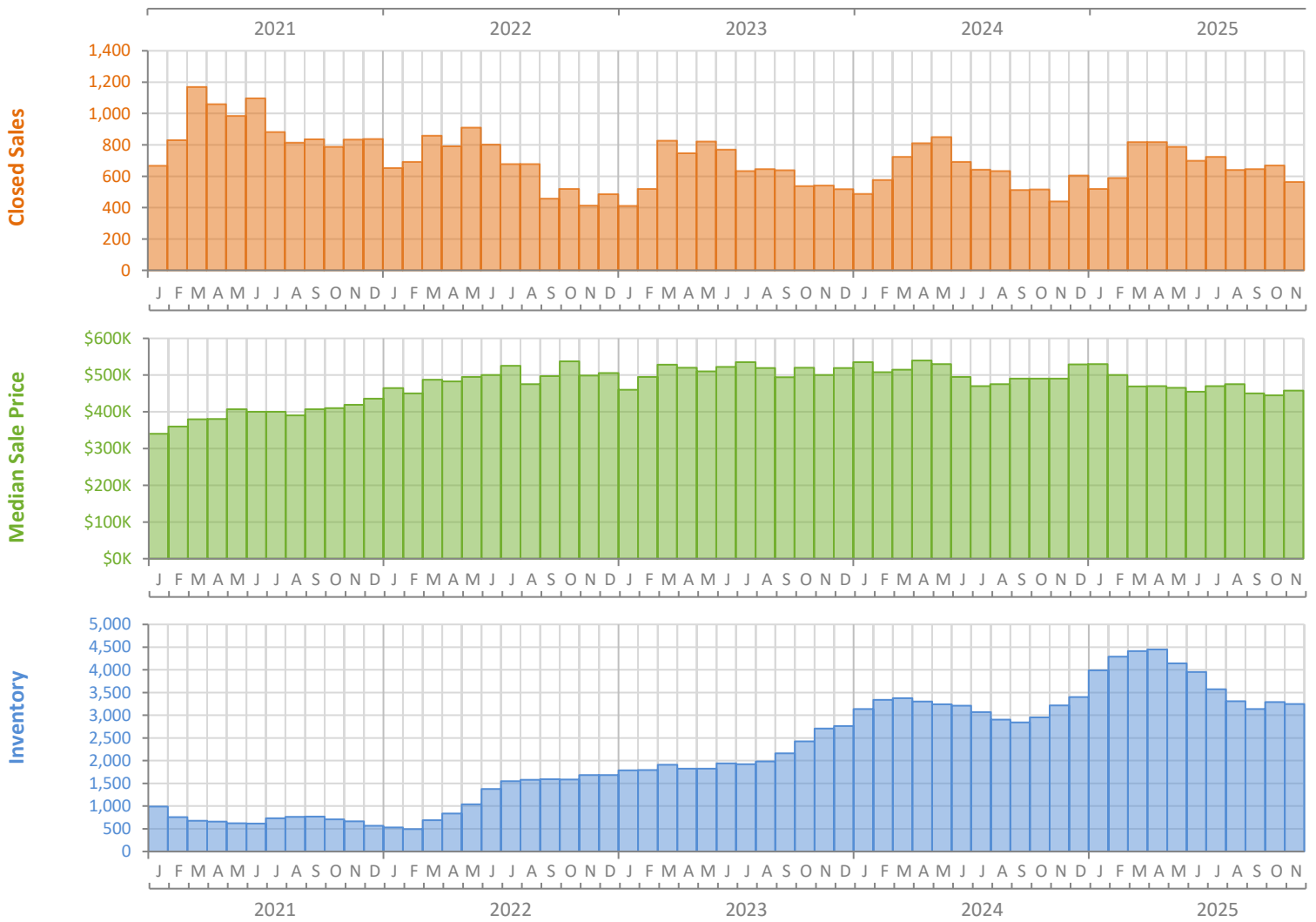
Monthly Market Summary - November 2025

Single-Family Homes

Sarasota County



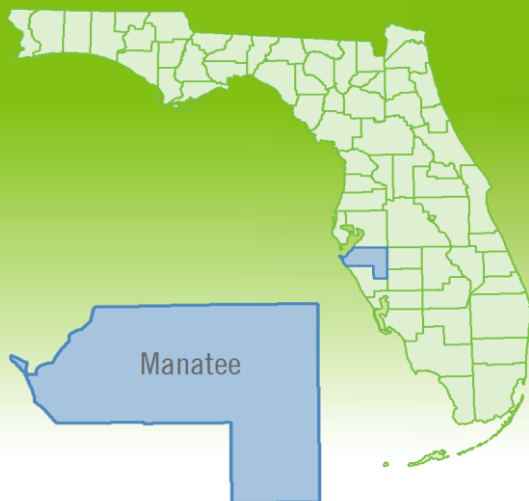
	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	564	439	28.5%
Paid in Cash	241	187	28.9%
Median Sale Price	\$457,495	\$490,000	-6.6%
Average Sale Price	\$665,717	\$708,439	-6.0%
Dollar Volume	\$375.5 Million	\$311.0 Million	20.7%
Med. Pct. of Orig. List Price Received	93.3%	94.6%	-1.4%
Median Time to Contract	54 Days	53 Days	1.9%
Median Time to Sale	94 Days	94 Days	0.0%
New Pending Sales	597	516	15.7%
New Listings	755	971	-22.2%
Pending Inventory	826	721	14.6%
Inventory (Active Listings)	3,245	3,220	0.8%
Months Supply of Inventory	4.8	5.2	-7.7%



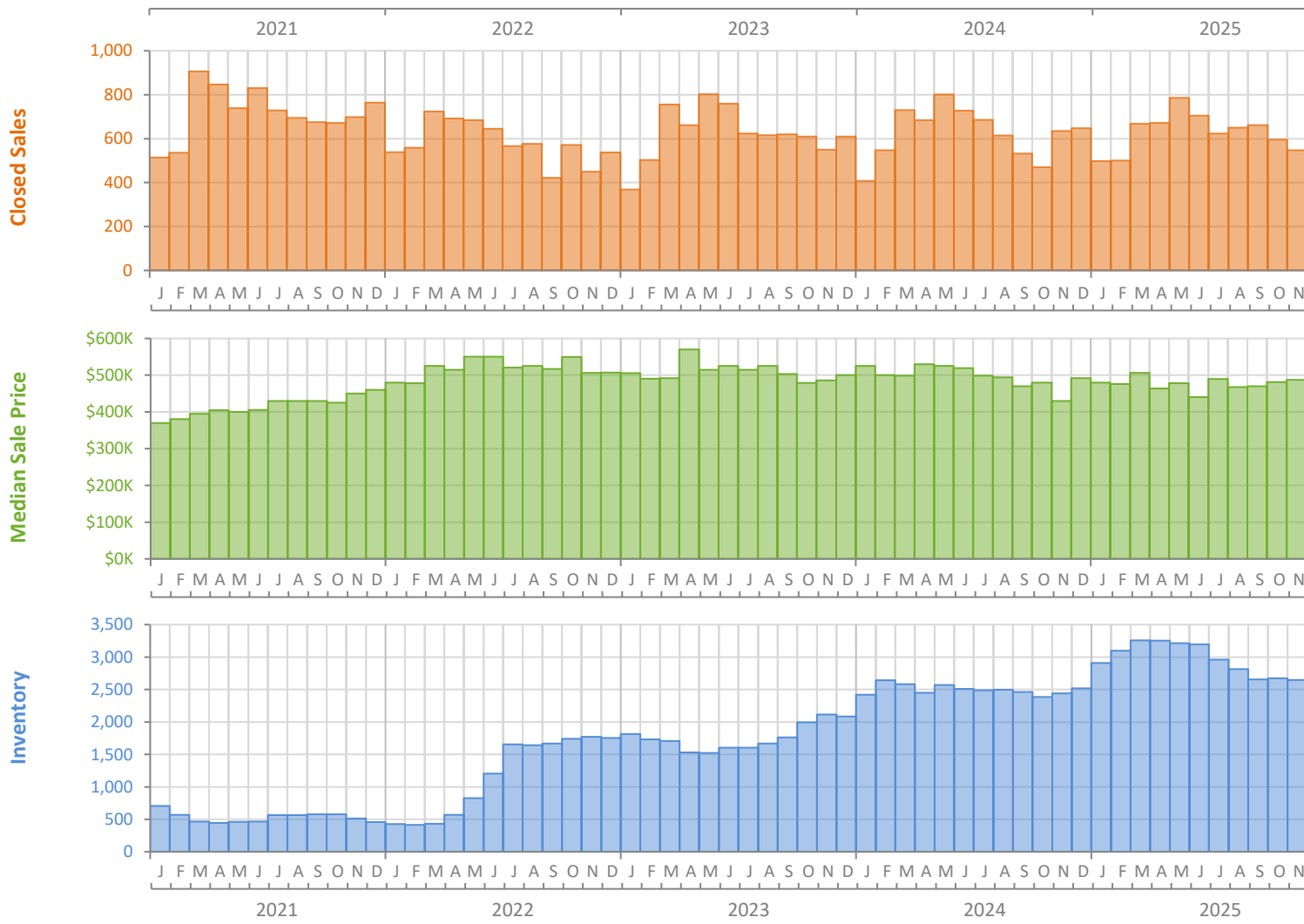
Monthly Market Summary - November 2025

Single-Family Homes

Manatee County



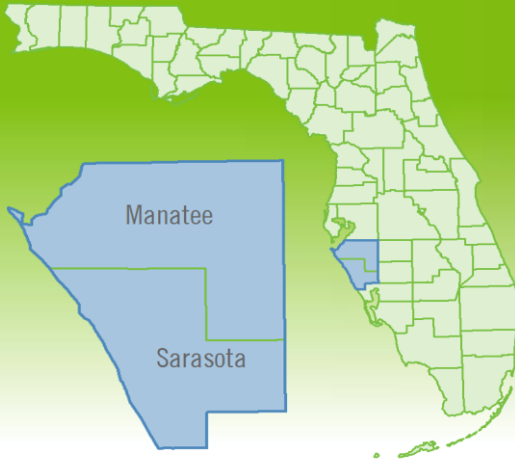
	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	548	635	-13.7%
Paid in Cash	148	185	-20.0%
Median Sale Price	\$487,233	\$430,000	13.3%
Average Sale Price	\$653,655	\$599,764	9.0%
Dollar Volume	\$358.2 Million	\$380.9 Million	-5.9%
Med. Pct. of Orig. List Price Received	94.5%	95.1%	-0.6%
Median Time to Contract	59 Days	45 Days	31.1%
Median Time to Sale	102 Days	102 Days	0.0%
New Pending Sales	513	637	-19.5%
New Listings	693	853	-18.8%
Pending Inventory	789	776	1.7%
Inventory (Active Listings)	2,647	2,442	8.4%
Months Supply of Inventory	4.2	3.9	7.7%



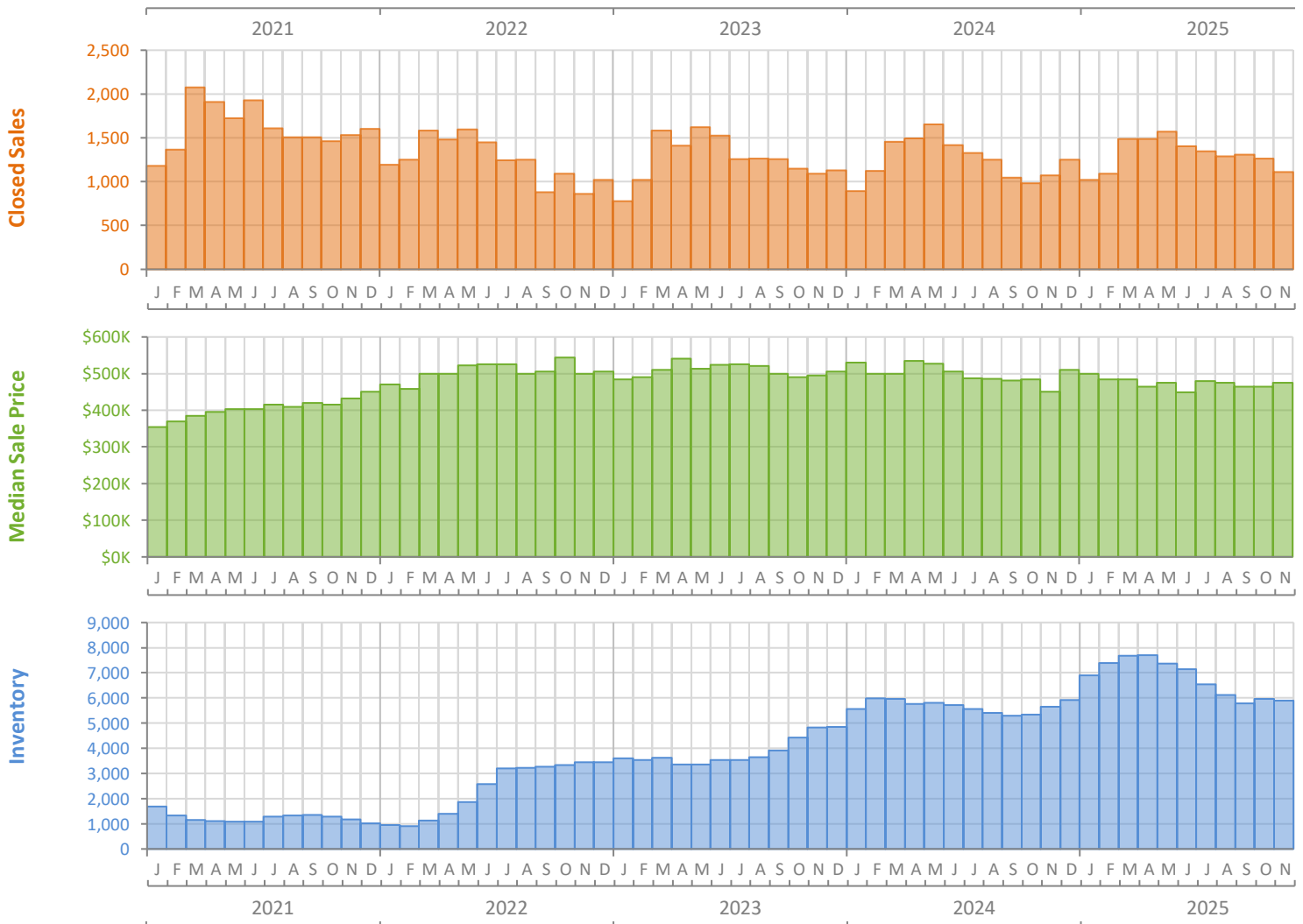
Monthly Market Summary - November 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



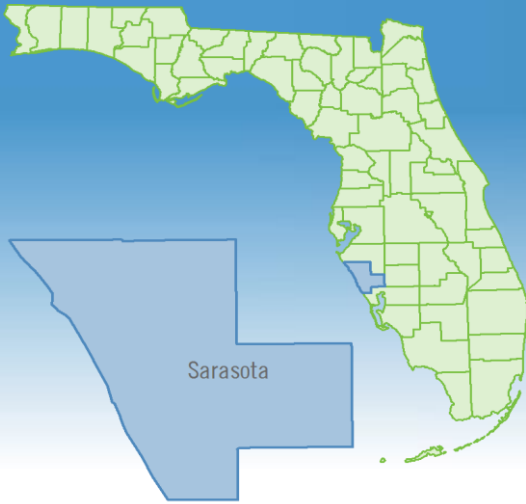
	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	1,112	1,074	3.5%
Paid in Cash	389	372	4.6%
Median Sale Price	\$475,000	\$449,945	5.6%
Average Sale Price	\$659,773	\$644,167	2.4%
Dollar Volume	\$733.7 Million	\$691.8 Million	6.0%
Med. Pct. of Orig. List Price Received	93.9%	94.9%	-1.1%
Median Time to Contract	56 Days	47 Days	19.1%
Median Time to Sale	98 Days	98 Days	0.0%
New Pending Sales	1,110	1,153	-3.7%
New Listings	1,448	1,824	-20.6%
Pending Inventory	1,615	1,497	7.9%
Inventory (Active Listings)	5,892	5,662	4.1%
Months Supply of Inventory	4.5	4.6	-2.2%



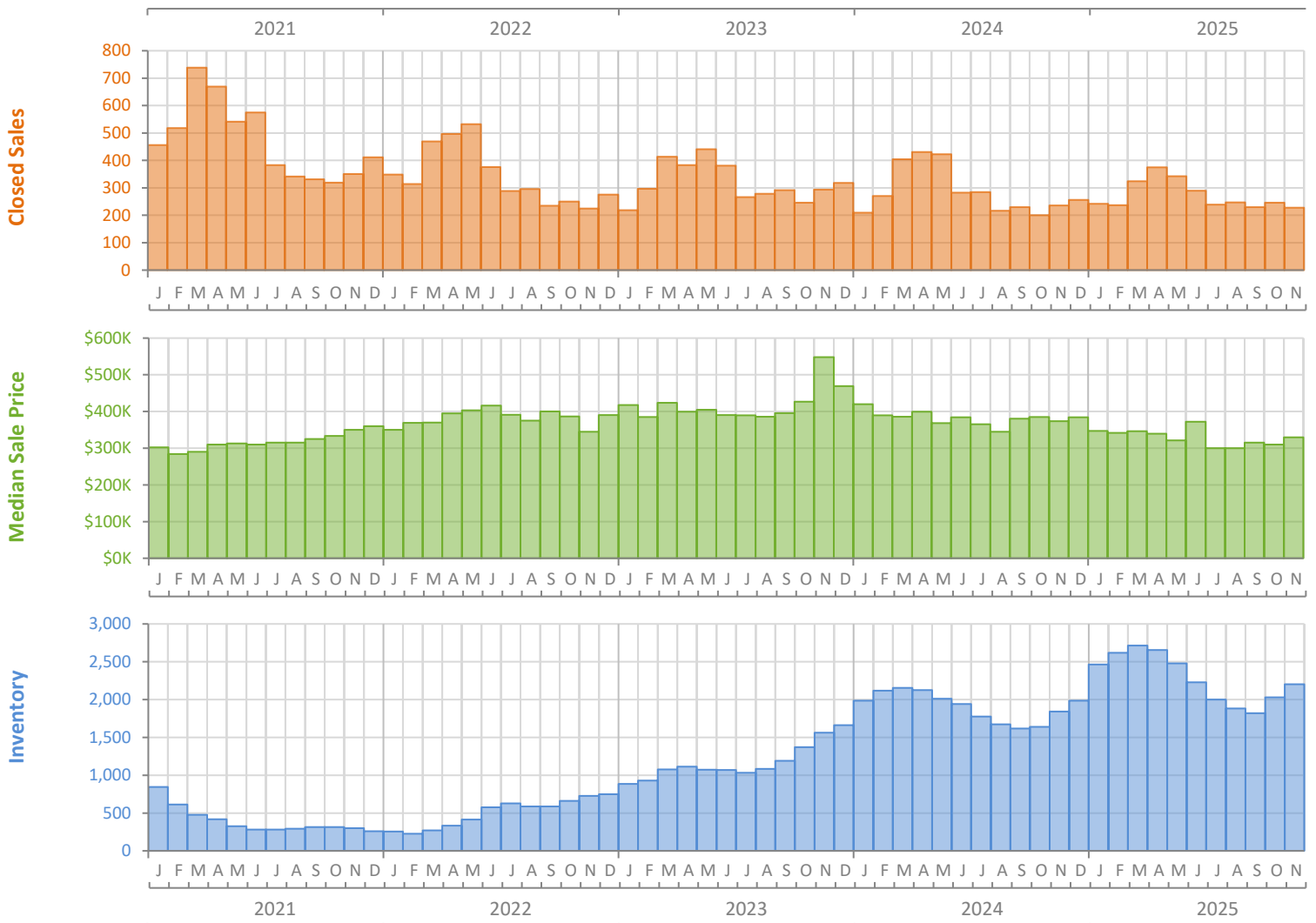
Monthly Market Summary - November 2025

Townhouses and Condos

Sarasota County



	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	228	236	-3.4%
Paid in Cash	142	142	0.0%
Median Sale Price	\$329,500	\$373,700	-11.8%
Average Sale Price	\$491,300	\$724,991	-32.2%
Dollar Volume	\$112.0 Million	\$171.1 Million	-34.5%
Med. Pct. of Orig. List Price Received	92.0%	93.5%	-1.6%
Median Time to Contract	61 Days	65 Days	-6.2%
Median Time to Sale	103 Days	118 Days	-12.7%
New Pending Sales	265	236	12.3%
New Listings	527	544	-3.1%
Pending Inventory	511	484	5.6%
Inventory (Active Listings)	2,203	1,843	19.5%
Months Supply of Inventory	8.1	6.3	28.6%



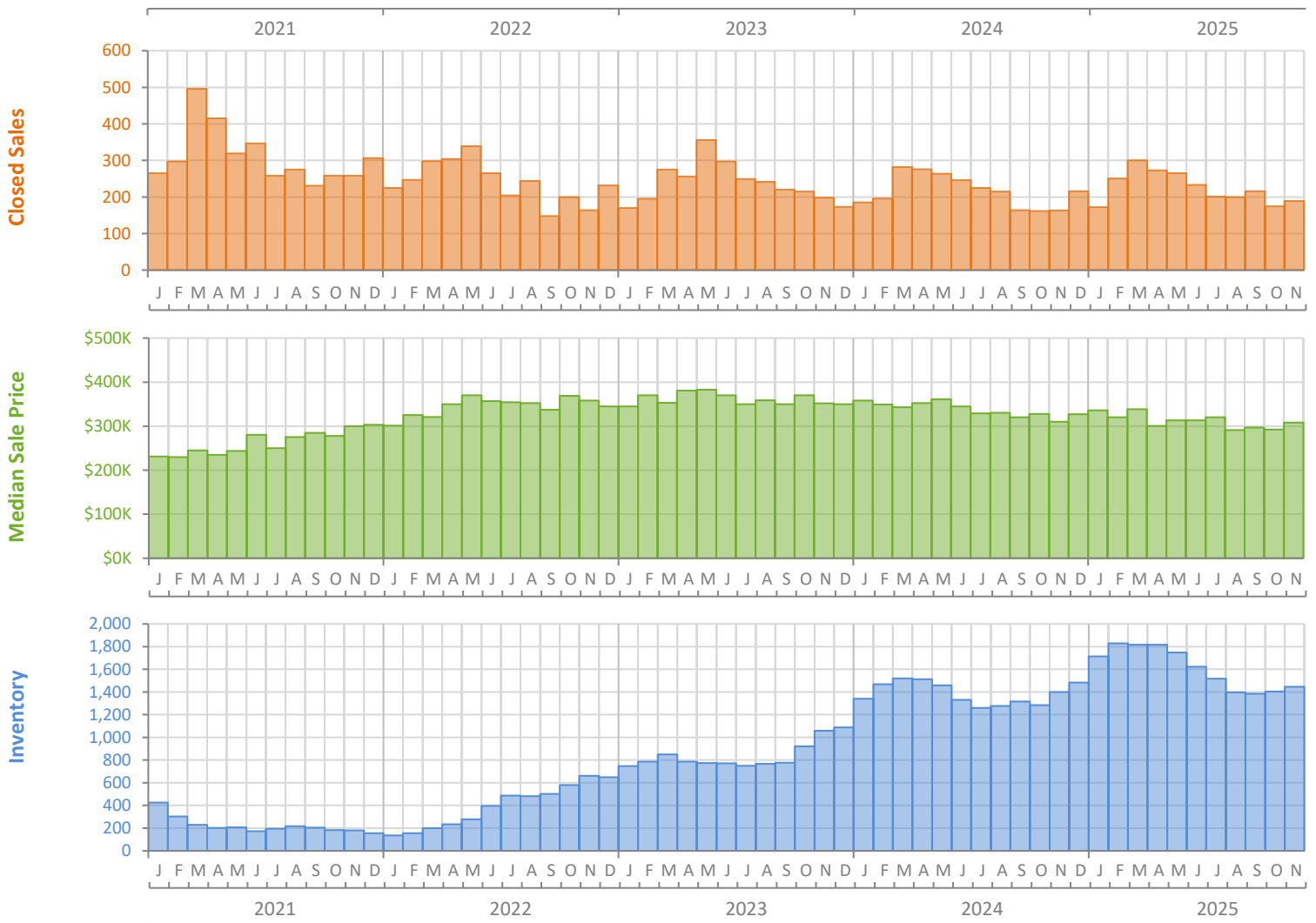
Monthly Market Summary - November 2025

Townhouses and Condos

Manatee County



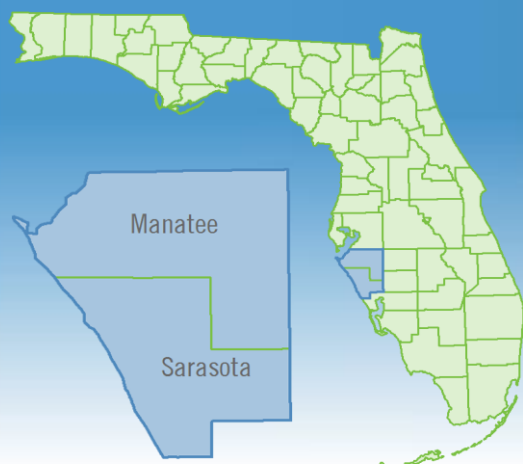
	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	189	163	16.0%
Paid in Cash	93	79	17.7%
Median Sale Price	\$308,000	\$309,900	-0.6%
Average Sale Price	\$332,602	\$345,065	-3.6%
Dollar Volume	\$62.9 Million	\$56.2 Million	11.8%
Med. Pct. of Orig. List Price Received	92.3%	94.2%	-2.0%
Median Time to Contract	74 Days	53 Days	39.6%
Median Time to Sale	115 Days	94 Days	22.3%
New Pending Sales	230	206	11.7%
New Listings	355	410	-13.4%
Pending Inventory	285	278	2.5%
Inventory (Active Listings)	1,447	1,400	3.4%
Months Supply of Inventory	6.5	6.6	-1.5%



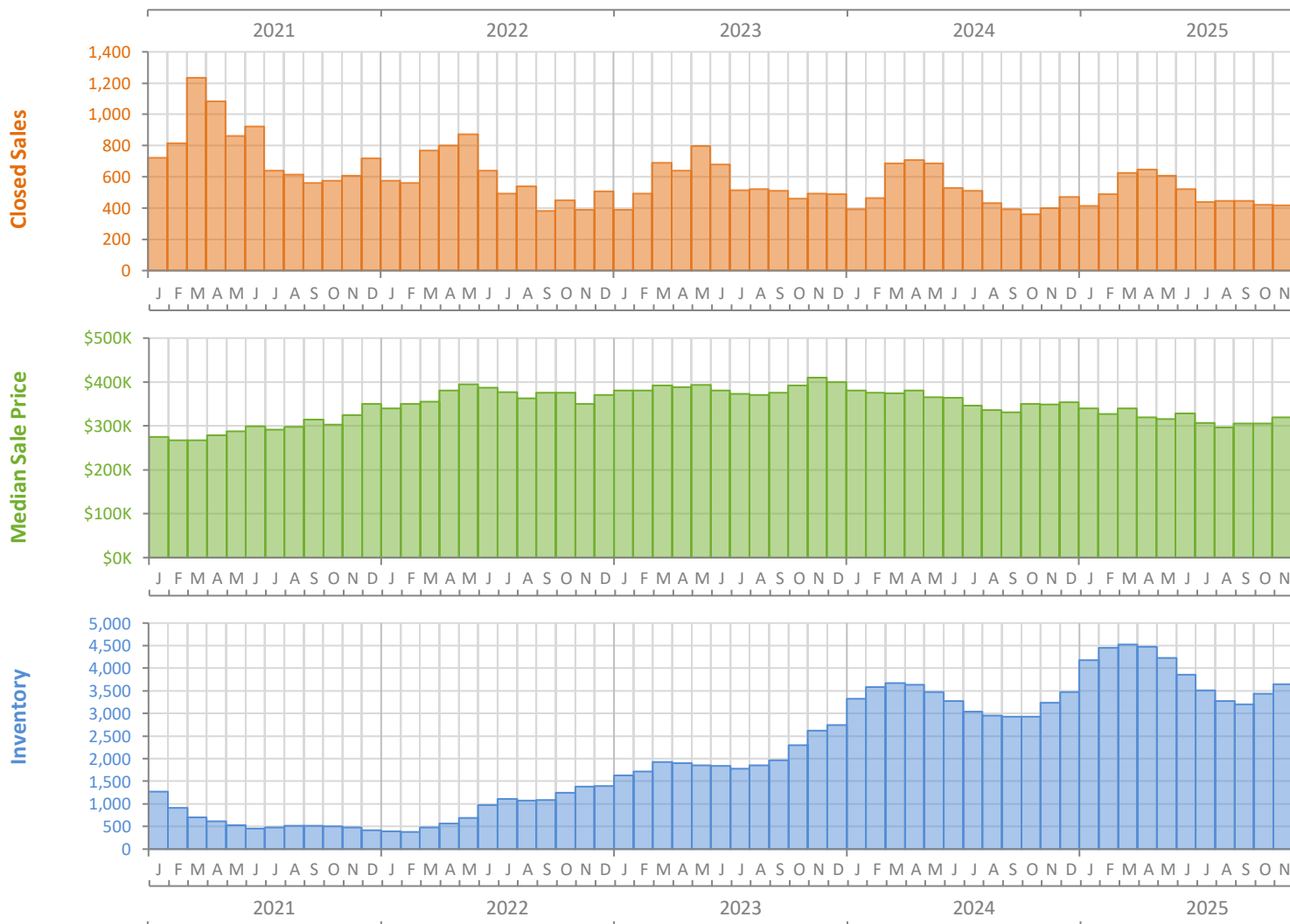
Monthly Market Summary - November 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



	November 2025	November 2024	Percent Change Year-over-Year
Closed Sales	417	399	4.5%
Paid in Cash	235	221	6.3%
Median Sale Price	\$319,990	\$349,000	-8.3%
Average Sale Price	\$419,372	\$569,783	-26.4%
Dollar Volume	\$174.9 Million	\$227.3 Million	-23.1%
Med. Pct. of Orig. List Price Received	92.1%	93.8%	-1.8%
Median Time to Contract	71 Days	59 Days	20.3%
Median Time to Sale	107 Days	106 Days	0.9%
New Pending Sales	495	442	12.0%
New Listings	882	954	-7.5%
Pending Inventory	796	762	4.5%
Inventory (Active Listings)	3,650	3,243	12.6%
Months Supply of Inventory	7.4	6.4	15.6%





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RASM MARKET STATISTICS

EXPANDED REPORTS

Sarasota and Manatee Counties

NOVEMBER 2025

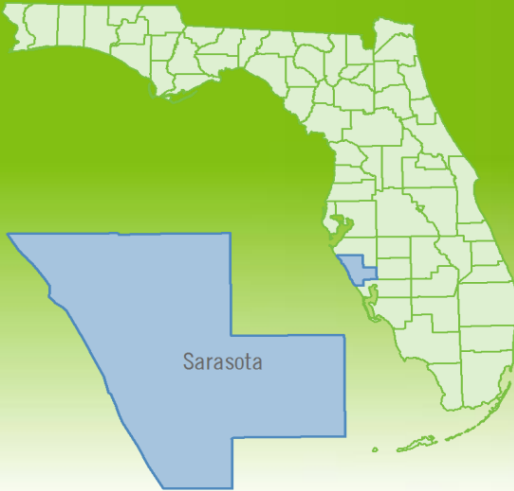
Reach Further With The Market.

For more detailed reports, visit
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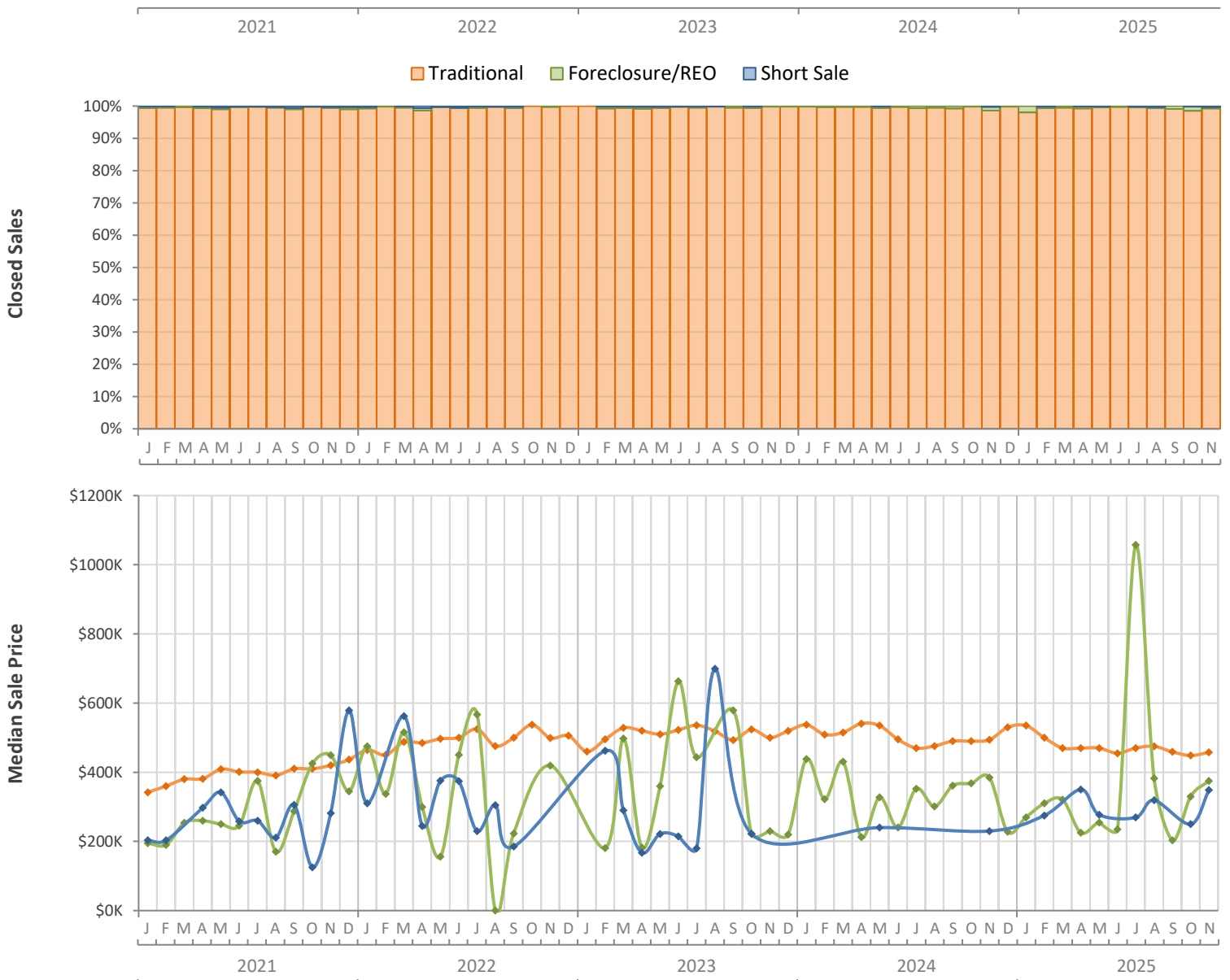
Monthly Distressed Market - November 2025

Single-Family Homes

Sarasota County



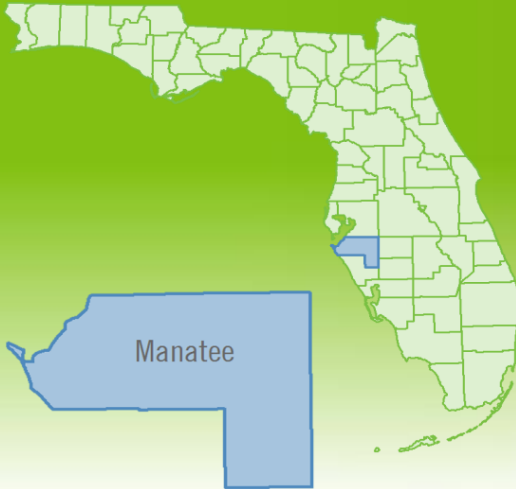
		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	560	433	29.3%
	Median Sale Price	\$457,495	\$493,750	-7.3%
Foreclosure/REO	Closed Sales	2	5	-60.0%
	Median Sale Price	\$375,000	\$385,000	-2.6%
Short Sale	Closed Sales	2	1	100.0%
	Median Sale Price	\$348,500	\$230,000	51.5%



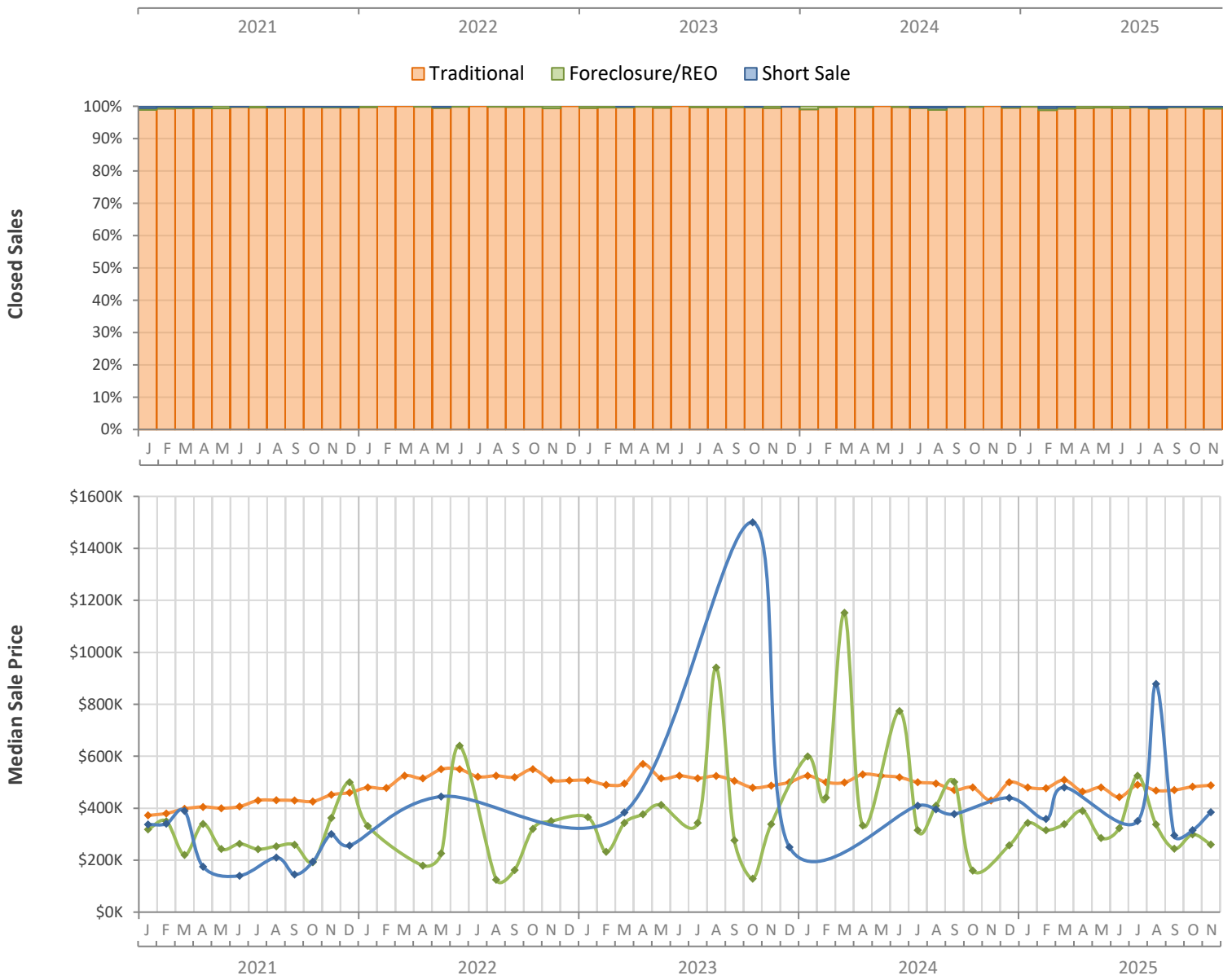
Monthly Distressed Market - November 2025

Single-Family Homes

Manatee County



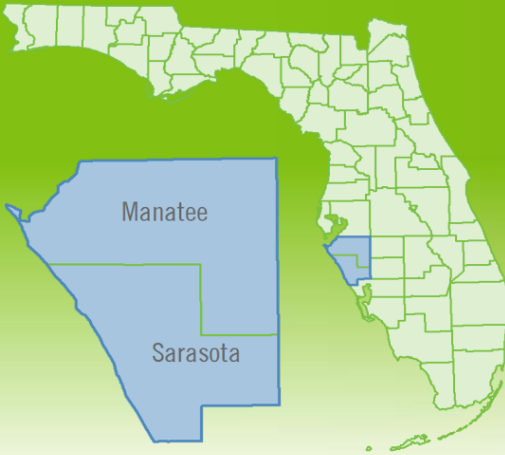
		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	544	635	-14.3%
	Median Sale Price	\$487,983	\$430,000	13.5%
Foreclosure/REO	Closed Sales	3	0	N/A
	Median Sale Price	\$260,000	(No Sales)	N/A
Short Sale	Closed Sales	1	0	N/A
	Median Sale Price	\$385,000	(No Sales)	N/A



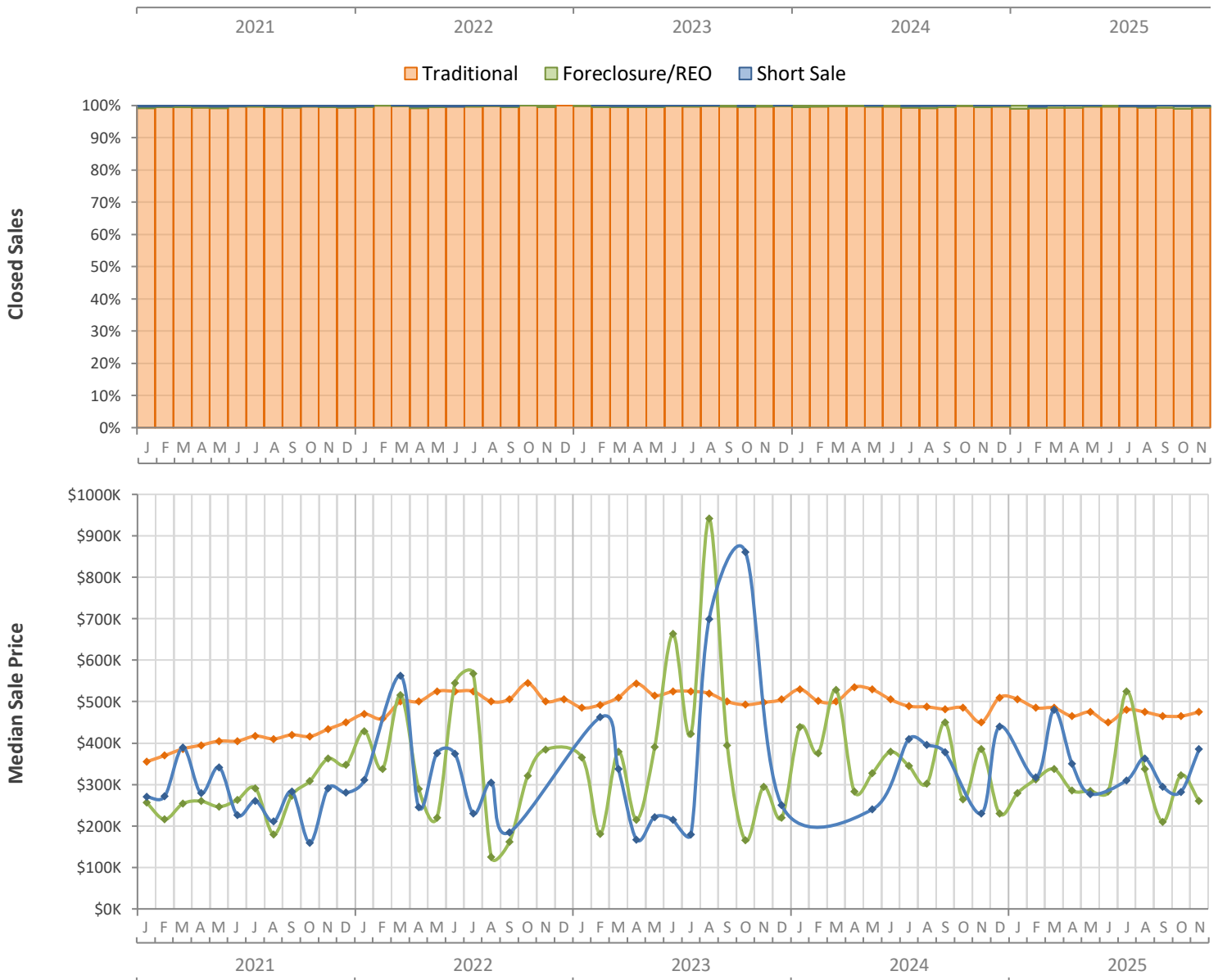
Monthly Distressed Market - November 2025

Single-Family Homes

North Port-Sarasota-Bradenton MSA



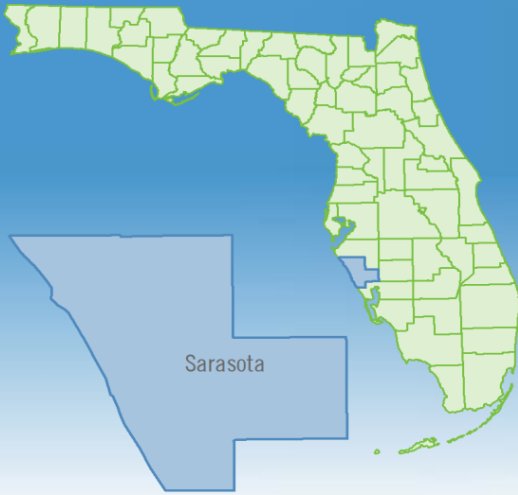
		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	1,104	1,068	3.4%
	Median Sale Price	\$475,000	\$450,000	5.6%
Foreclosure/REO	Closed Sales	5	5	0.0%
	Median Sale Price	\$260,000	\$385,000	-32.5%
Short Sale	Closed Sales	3	1	200.0%
	Median Sale Price	\$385,000	\$230,000	67.4%



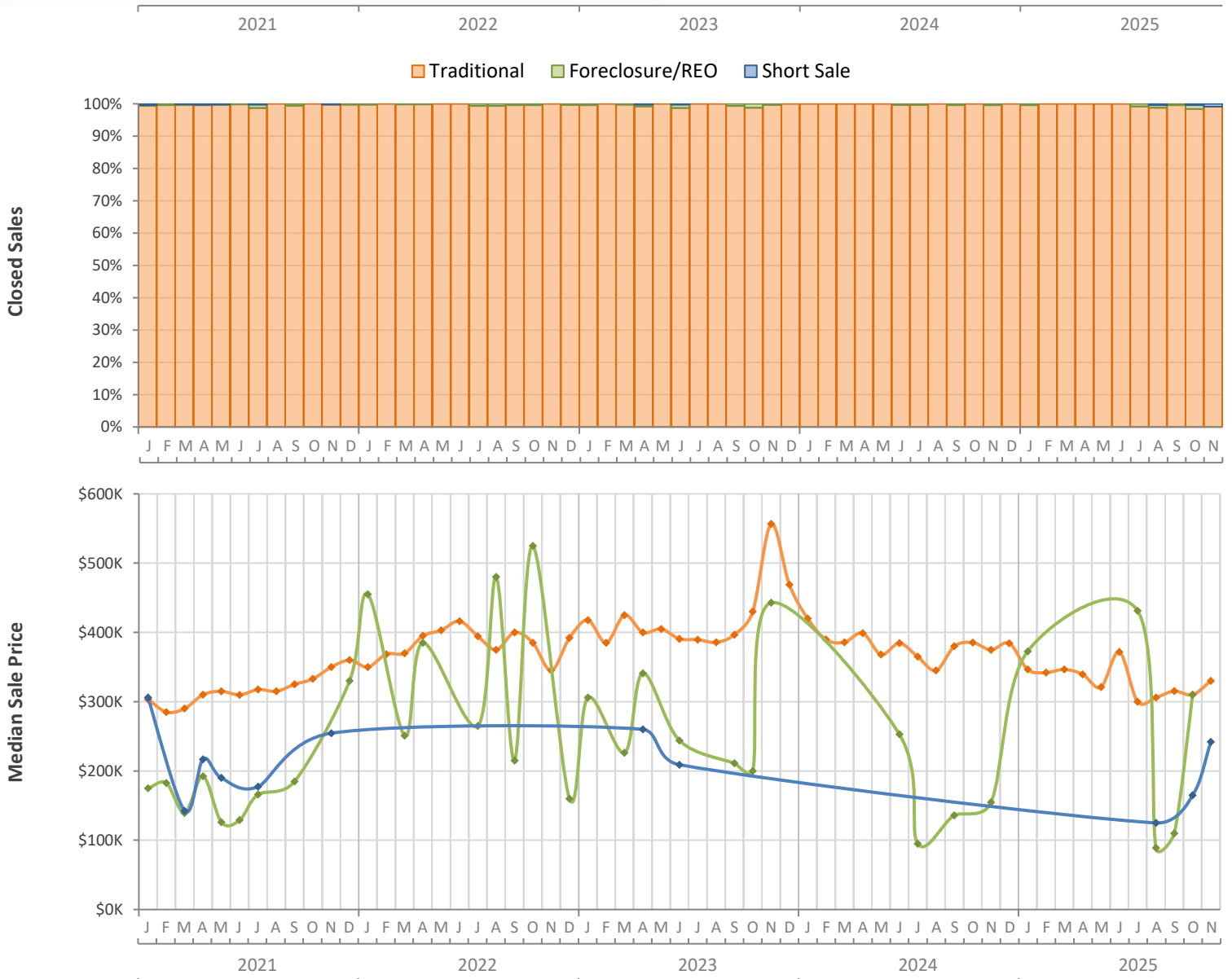
Monthly Distressed Market - November 2025

Townhouses and Condos

Sarasota County



		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	226	235	-3.8%
	Median Sale Price	\$330,000	\$374,900	-12.0%
Foreclosure/REO	Closed Sales	0	1	-100.0%
	Median Sale Price	(No Sales)	\$154,700	N/A
Short Sale	Closed Sales	2	0	N/A
	Median Sale Price	\$242,000	(No Sales)	N/A



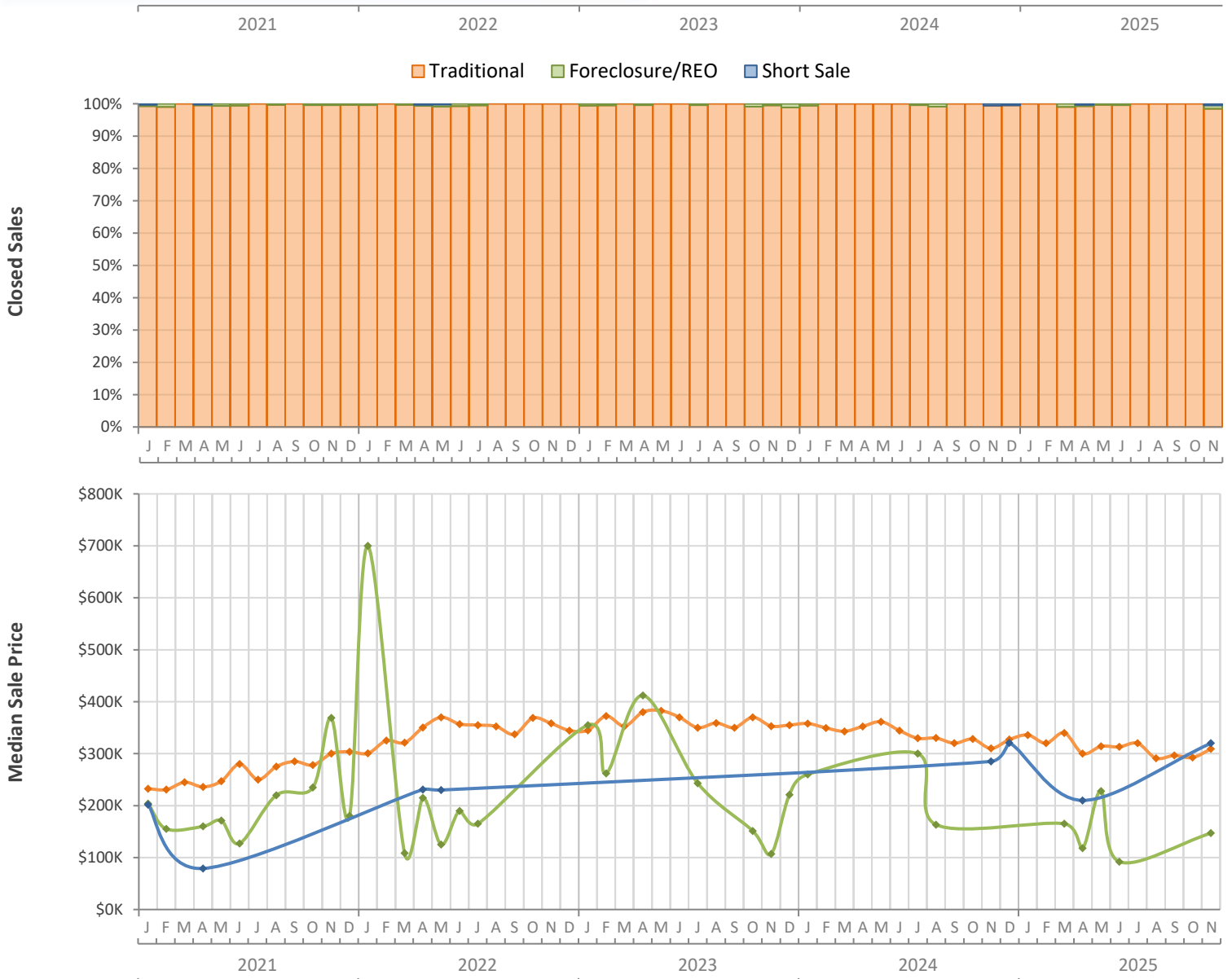
Monthly Distressed Market - November 2025

Townhouses and Condos

Manatee County



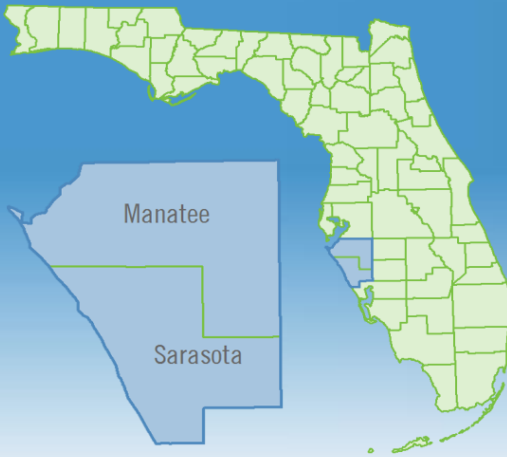
		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	186	162	14.8%
	Median Sale Price	\$309,000	\$309,945	-0.3%
Foreclosure/REO	Closed Sales	2	0	N/A
	Median Sale Price	\$146,934	(No Sales)	N/A
Short Sale	Closed Sales	1	1	0.0%
	Median Sale Price	\$320,000	\$285,000	12.3%



Monthly Distressed Market - November 2025

Townhouses and Condos

North Port-Sarasota-Bradenton MSA



		November 2025	November 2024	Percent Change Year-over-Year
Traditional	Closed Sales	412	397	3.8%
	Median Sale Price	\$320,000	\$349,920	-8.6%
Foreclosure/REO	Closed Sales	2	1	100.0%
	Median Sale Price	\$146,934	\$154,700	-5.0%
Short Sale	Closed Sales	3	1	200.0%
	Median Sale Price	\$310,000	\$285,000	8.8%

