



Market Report

OCTOBER 2025 REPORT



BONNYCASTLE

Bonnycastle Realty provides an unparalleled standard of luxury services to buyers and sellers in Collier and Lee counties, Florida. Putting a fresh spin on a dated industry, our highly personalized, concierge-style assistance is infused with revolutionary real estate advancements.

Here at Bonnycastle, we're tech savvy and solutions oriented, filling whatever gaps we see in the industry with innovative excellence. As business-minded agents, we make data-driven decisions to maximize our marketing efforts and ultimately produce top-dollar deals, all in a trendsetting style.

Still, our entrepreneurial attitude doesn't sacrifice our human-to-human interaction — we're committed to building deep-rooted relationships that last long after the closing papers are signed. We understand that buying or selling a home is one of life's biggest financial decisions, which is why we'll guide you through every step to help you navigate the process with ease.

As Naples locals ourselves, we're motivated to share the high-quality life we live. Our team will go above and beyond to find the property that will elevate your lifestyle in the scenic Sunshine State.

Google



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WELCOME TO THE BONNYCASTLE OCTOBER 2025 REPORT THIS TEXT IS COURTSEY OF THE NAPLES AREA BOARD OF REALTORS MARKET REPORT

Increased foot traffic at open houses in October was a positive sign indicating the Naples housing market is building momentum as it approaches snowbird season. Buyers are responding to improved affordability. Broker analysts reviewing the October 2025 Market Report by the Naples Area Board of REALTORS® (NABOR®), which tracks home listings and sales within Collier County (excluding Marco Island), were concerned that reduced activity in the first quarter of the year – due to consumer uncertainty caused by tariffs – would linger for months; but the October report revealed not only market resilience, but a return to a balanced housing market. A balanced housing market occurs when the supply of homes for sale meets the demand from buyers, resulting in stable prices and a fair negotiating environment for both parties. Signs of improved consumer confidence in October were obvious in the 27.2 percent increase in new listings to 1,566 new listings from 1,231 new listings in October 2024, as well as the 48.5 percent increase in pending sales (homes under contract) to 790 pending sales from 532 pending sales in October 2024.

The overall median closed price in October increased .9 percent to \$575,000 from \$570,000 in October 2024. In comparison, the median closed price in October 2019 (pre-pandemic) was \$329,790. However, there were 1,161 price decreases in October, which shows a continued cooling trend by sellers.

QUICK FACTS

OVERALL MARKET FACTS

INVENTORY



5,386

↑ 6.7%

PENDINGS



790

↑ 48.5%

NEW LISTINGS



1,566

↑ 27.2%

MEDIAN CLOSED PRICE



\$575,000

↑ 1%

CLOSED SALES



663

↑ 33.4%

DAYS ON MARKET



107

↓ 20%

OVERALL MARKET OVERVIEW

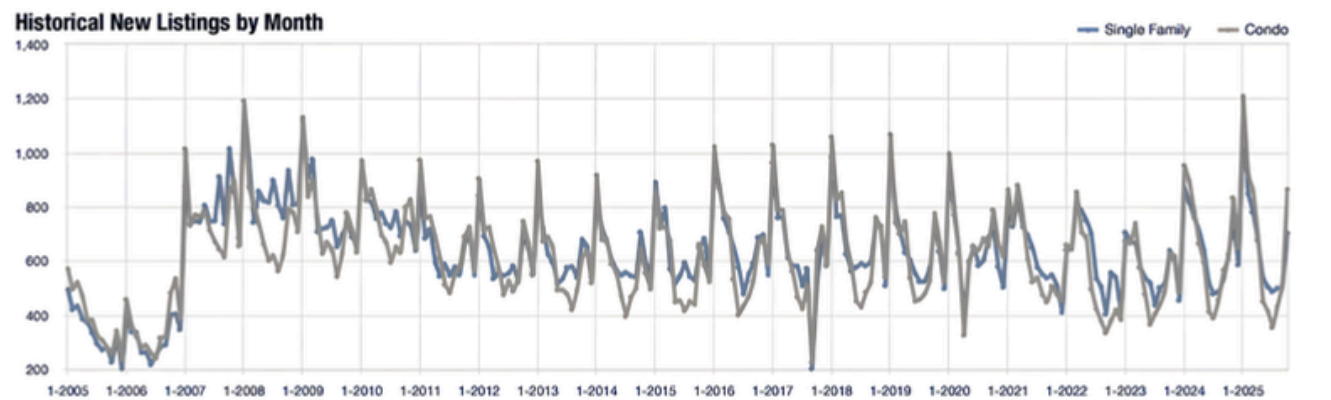
Key metrics by report month and for year-to-date (YTD) starting from the first of the year.

Key Metrics	Historical Sparkbars	10-2024	10-2025	% Change	YTD 2024	YTD 2025	% Change
New Listings		1,231	1,566	+ 27.2%	12,750	13,323	+ 4.5%
Total Sales		497	663	+ 33.4%	6,924	6,955	+ 0.4%
Days on Market Until Sale		89	107	+ 20.2%	73	95	+ 30.1%
Median Closed Price		\$570,000	\$575,000	+ 0.9%	\$615,000	\$600,000	- 2.4%
Average Closed Price		\$898,628	\$1,007,014	+ 12.1%	\$1,082,123	\$1,141,182	+ 5.5%
Percent of List Price Received		95.2%	94.0%	- 1.3%	95.5%	94.3%	- 1.3%
Pending Listings		532	790	+48.5%	8,732	8,618	- 1.3%
Inventory of Homes for Sale		5,046	5,386	+ 6.7%	—	—	—
Months Supply of Inventory		7.5	8.1	+ 8.0%	—	—	—

OVERALL NEW LISTINGS

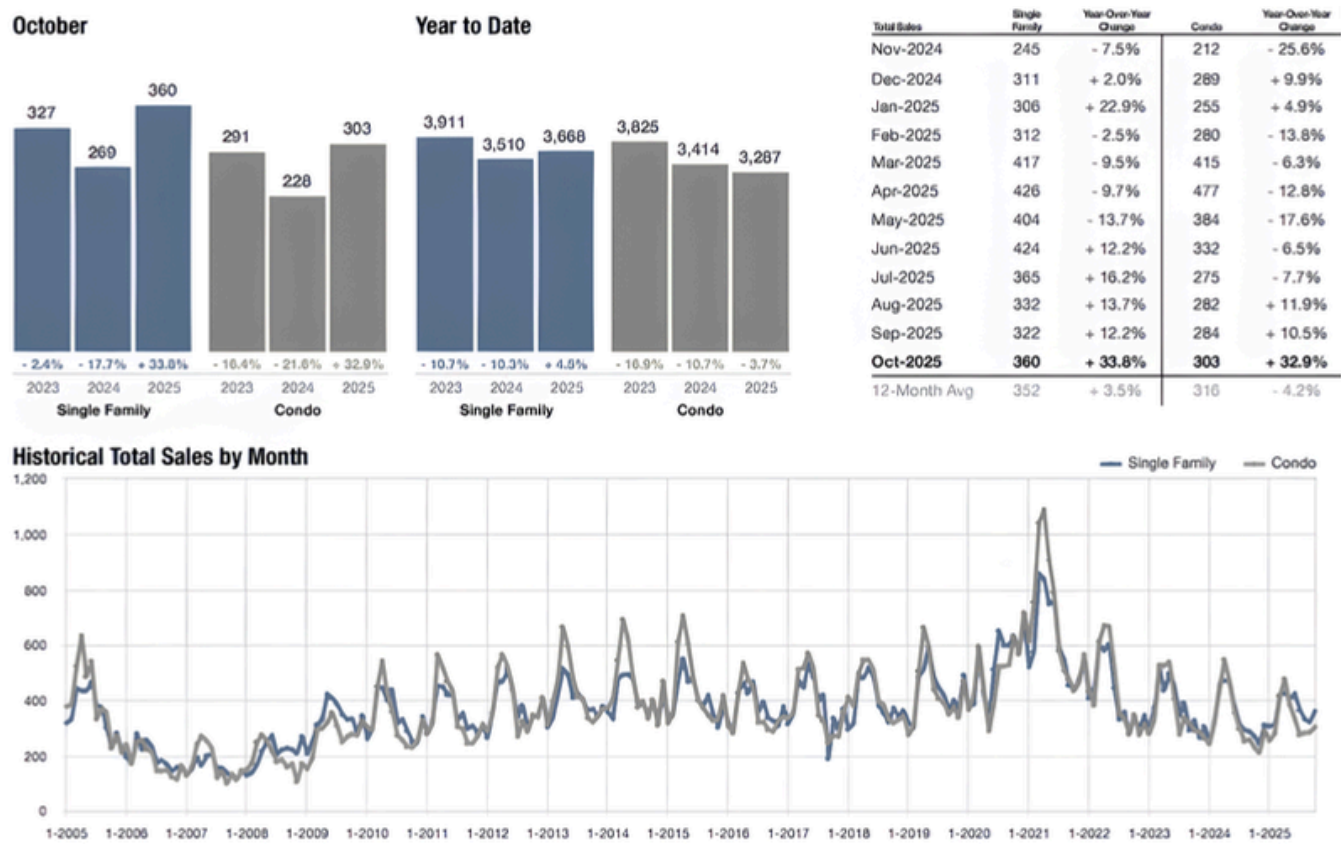
A count of the properties that have been newly listed on the market in a given month.

October			Year to Date			New Listings			
						New Listings	Single Family	Year-Over-Year Change	Condo
+ 14.7% - 2.2% + 12.5%			+ 65.1% - 2.7% + 42.3%			Nov-2024	740	+ 23.1%	833
2023 2024 2025			2023 2024 2025			Dec-2024	585	+ 28.9%	648
Single Family Condo			Single Family Condo			Jan-2025	1,091	+ 25.4%	1,208
						Feb-2025	848	+ 3.8%	914
						Mar-2025	780	+ 2.9%	863
						Apr-2025	676	- 5.2%	693
						May-2025	537	- 16.1%	450
						Jun-2025	503	- 2.3%	415
						Jul-2025	486	+ 1.7%	354
						Aug-2025	499	+ 2.9%	432
						Sep-2025	498	- 6.6%	510
						Oct-2025	702	+ 12.5%	864
						12-Month Avg	662	+ 6.1%	682



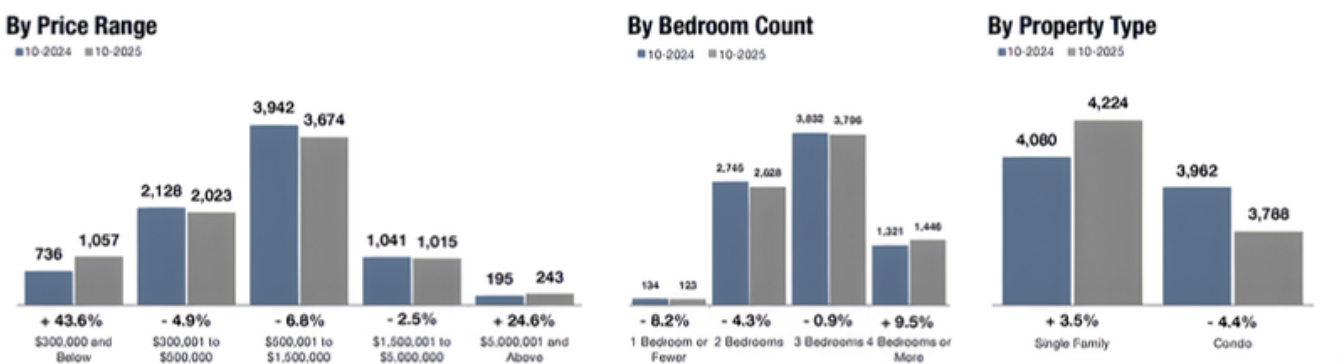
OVERALL CLOSED SALES

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



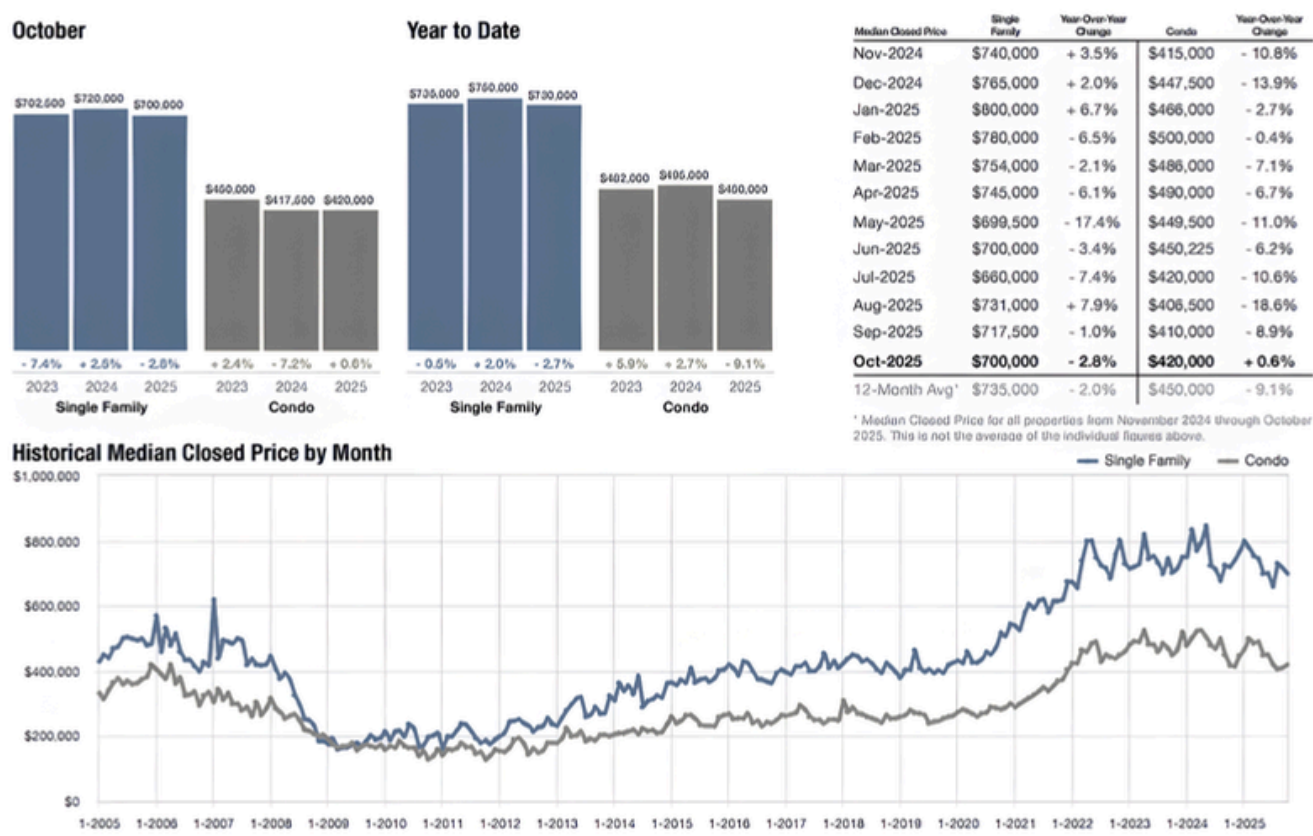
OVERALL CLOSED SALES BY PRICE RANGE

A count of the actual sales that closed in a given month. Based on a rolling 12-month total.



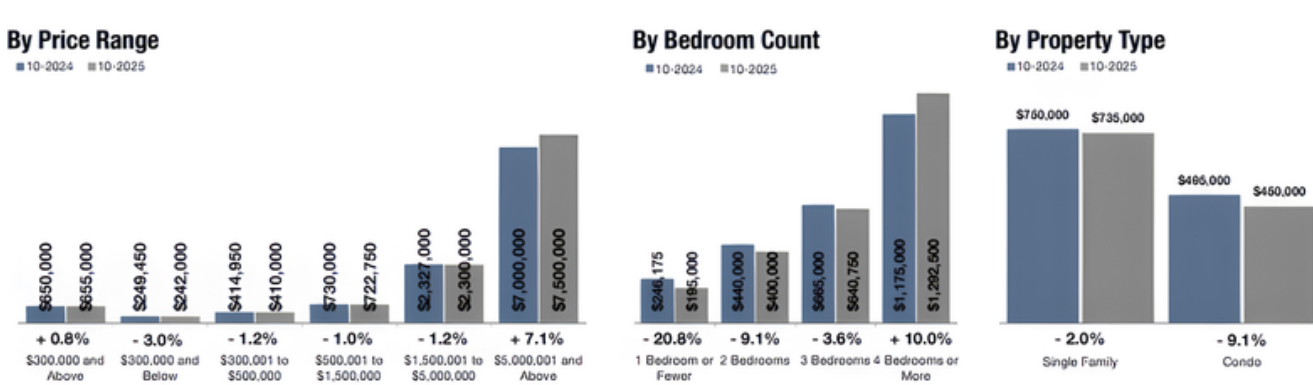
OVERALL MEDIAN CLOSED PRICE

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



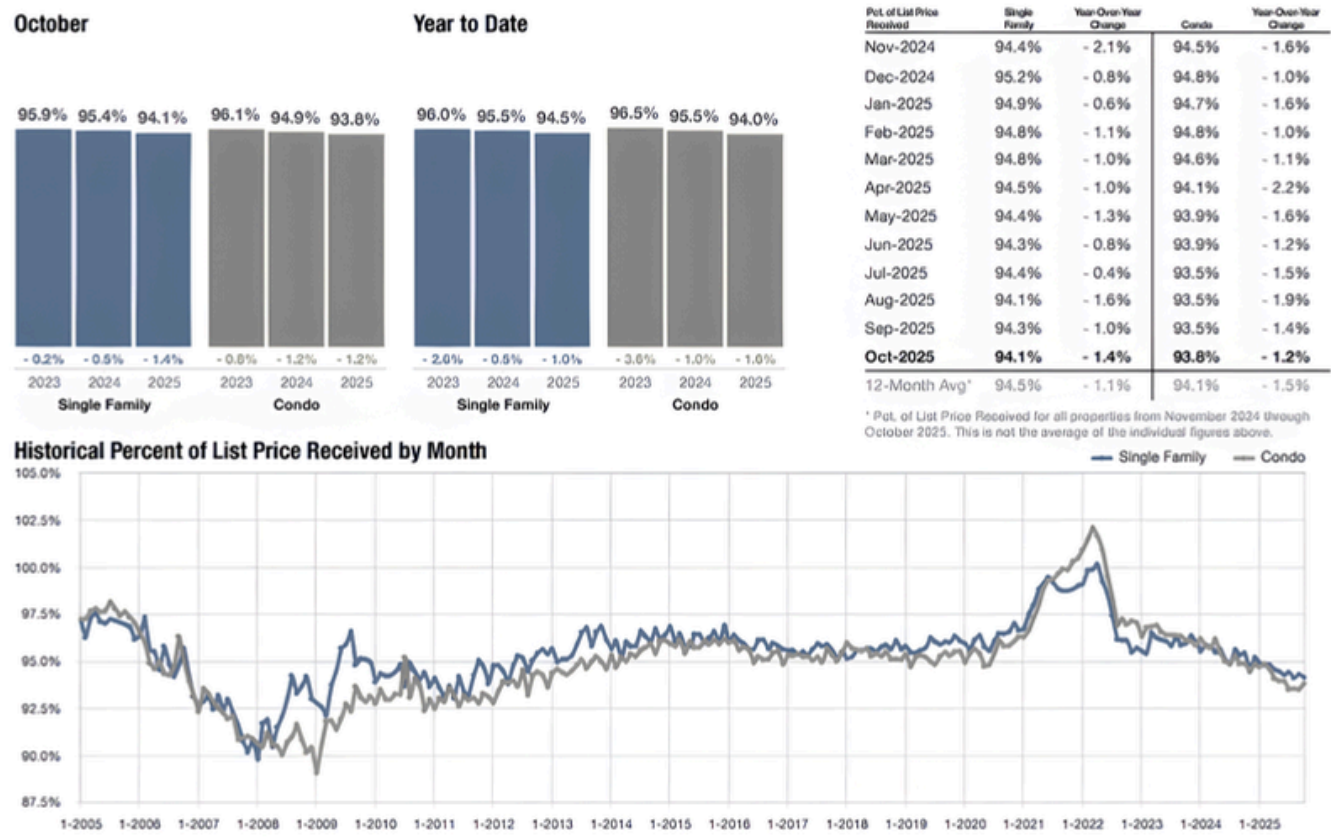
OVERALL MEDIAN CLOSED PRICE BY PRICE RANGE

Median price point for all closed sales, not accounting for seller concessions. Based on a rolling 12-month median.



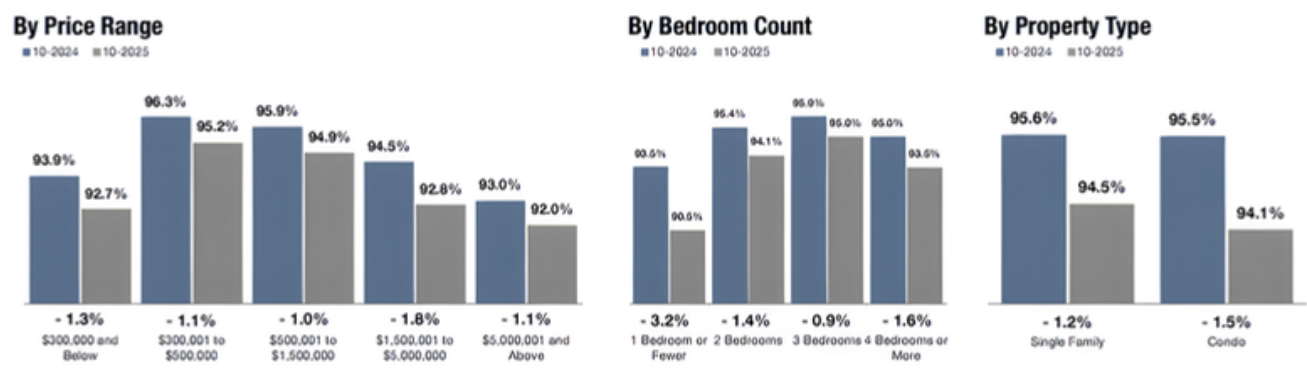
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED

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.



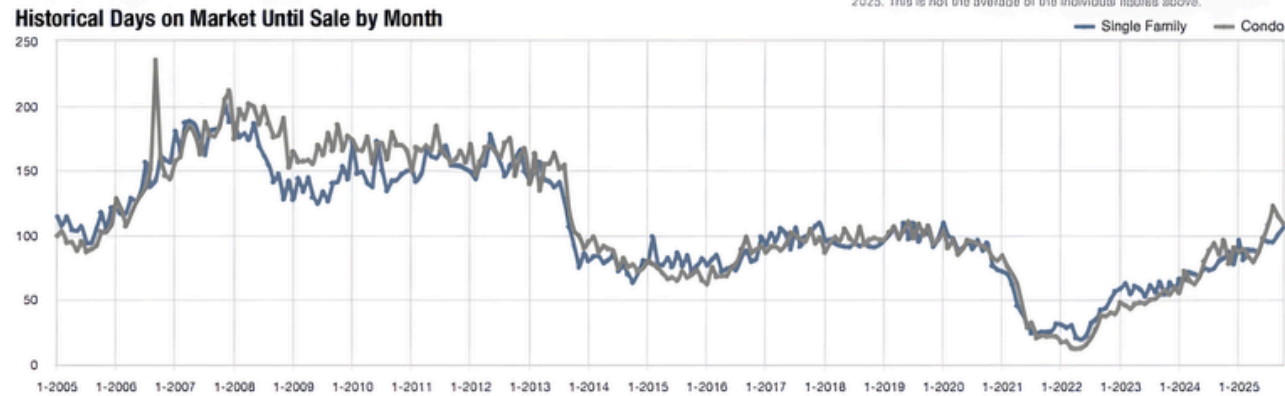
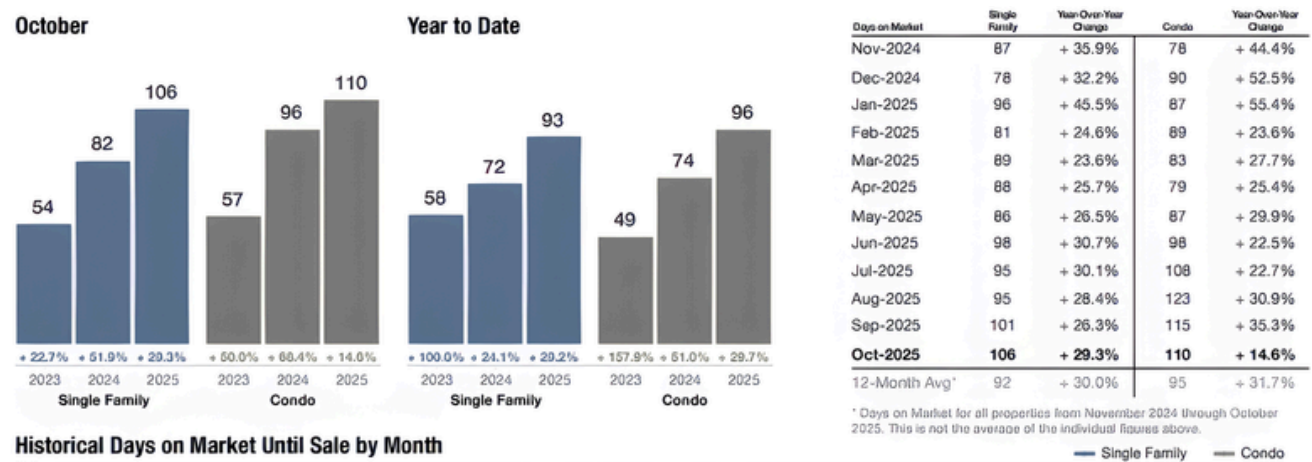
OVERALL PERCENT OF CURRENT LIST PRICE RECEIVED BY PRICE RANGE

Percentage found when dividing a property's sales price by its last list price, then taking the average for all properties sold, not accounting for seller concessions. Based on a rolling 12-month average.



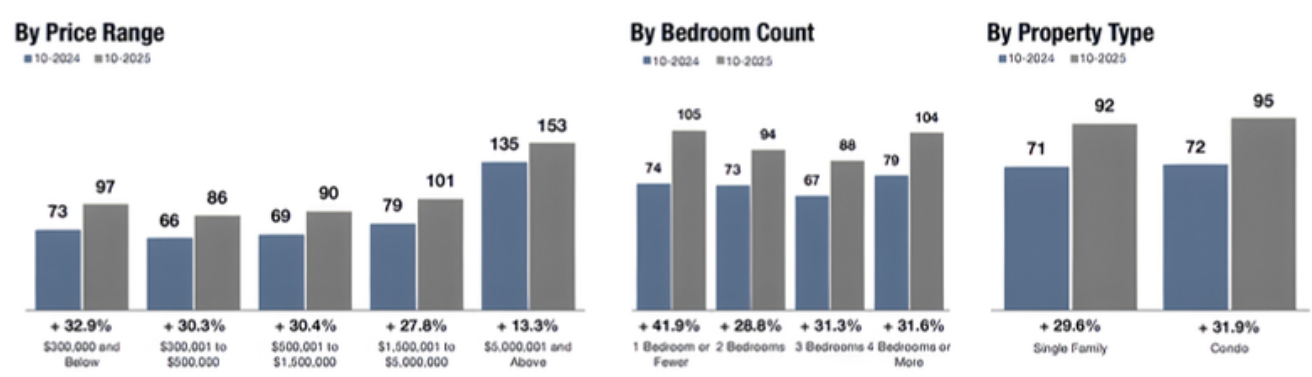
OVERALL DAYS ON MARKET UNTIL SALE

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



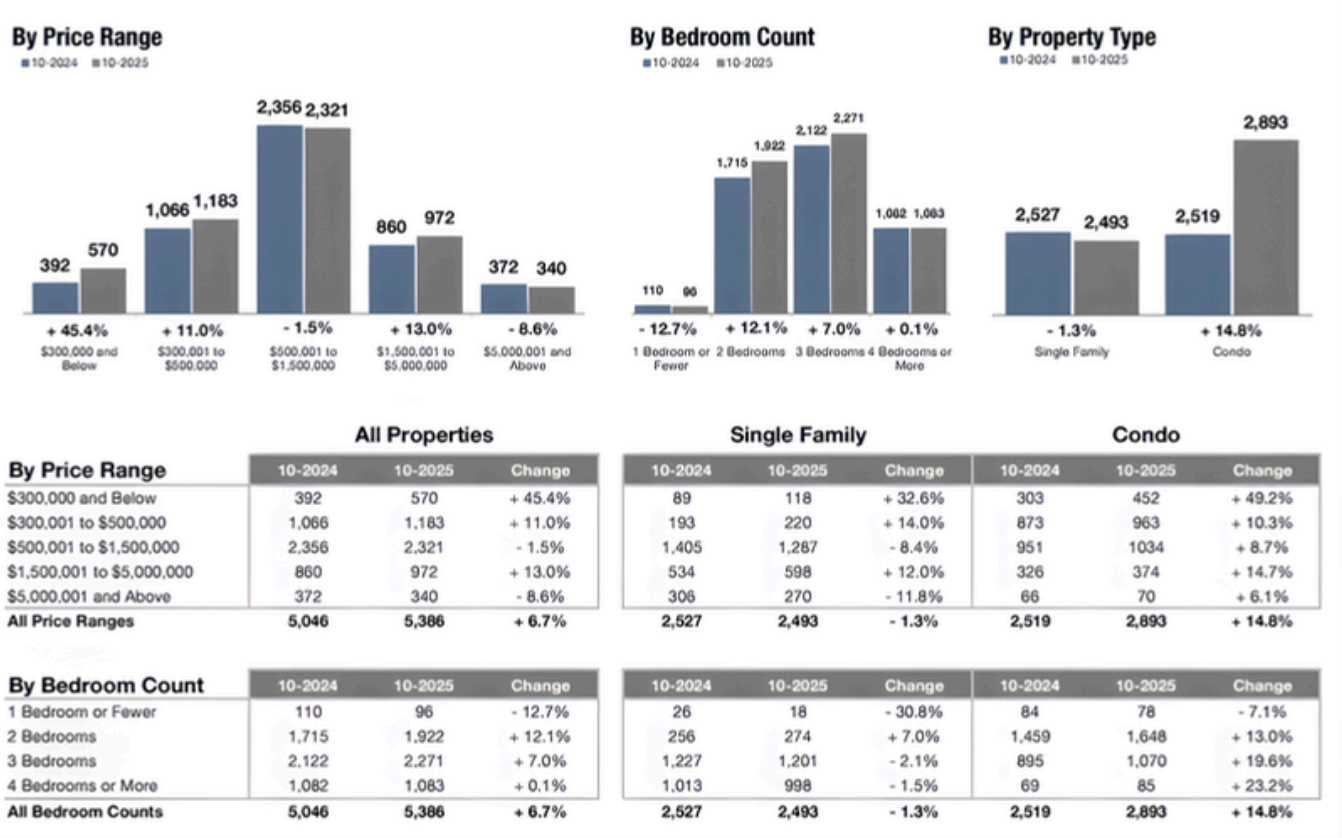
OVERALL DAYS ON MARKET UNTIL SALE BY PRICE RANGE

Average number of days between when a property is listed and when an offer is accepted. Based on a rolling 12-month average.



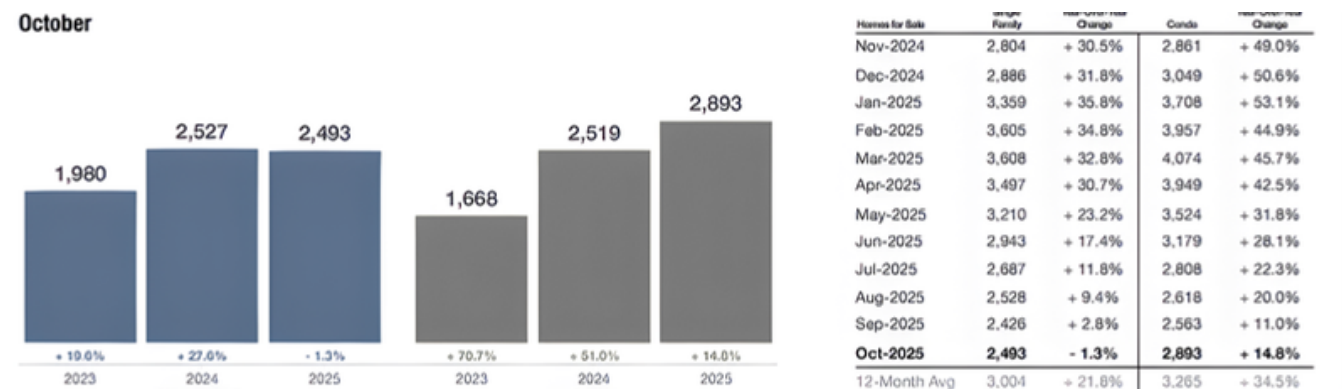
OVERALL INVENTORY OF HOMES FOR SALE

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



OVERALL INVENTORY OF HOMES FOR SALE BY PRICE RANGE

The number of properties available for sale in active status at the end of the most recent month. Based on one month of activity.



LOCAL MARKET UPDATE - NAPLES BEACH

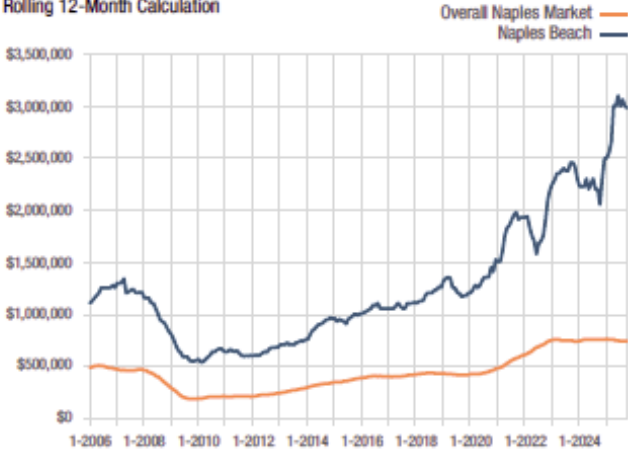
34102, 34103, 34108

Single Family	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	96	110	+ 14.6%	889	969	+ 9.0%
Total Sales	20	46	+ 130.0%	357	463	+ 29.7%
Days on Market Until Sale	85	121	+ 42.4%	115	139	+ 20.9%
Median Closed Price*	\$1,962,500	\$2,050,000	+ 4.5%	\$2,325,000	\$2,925,000	+ 25.8%
Average Closed Price*	\$2,825,495	\$3,511,696	+ 24.3%	\$4,280,412	\$5,131,431	+ 19.9%
Percent of List Price Received*	93.1%	91.2%	- 2.0%	92.7%	91.6%	- 1.2%
Inventory of Homes for Sale	508	491	- 3.3%	—	—	—
Months Supply of Inventory	14.7	11.3	- 23.1%	—	—	—

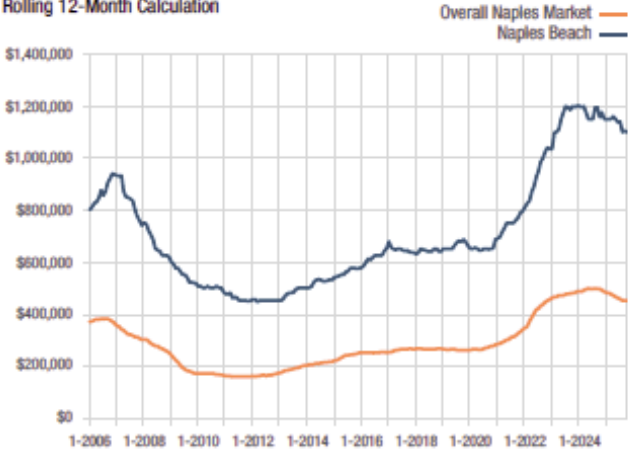
Condo	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	156	240	+ 53.8%	1,486	1,655	+ 11.4%
Total Sales	45	53	+ 17.8%	771	738	- 4.3%
Days on Market Until Sale	143	119	- 16.8%	94	108	+ 14.9%
Median Closed Price*	\$865,000	\$900,000	+ 4.0%	\$1,150,000	\$1,112,500	- 3.3%
Average Closed Price*	\$1,462,322	\$1,252,208	- 14.4%	\$1,666,665	\$1,598,606	- 4.1%
Percent of List Price Received*	93.8%	92.5%	- 1.4%	94.0%	92.4%	- 1.7%
Inventory of Homes for Sale	673	803	+ 19.3%	—	—	—
Months Supply of Inventory	9.2	11.7	+ 27.2%	—	—	—

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

Median Closed Price - Single Family
Rolling 12-Month Calculation



Median Closed Price - Condo
Rolling 12-Month Calculation



A rolling 12-month calculation represents the current month and the 11 months prior in a single data point. If no activity occurred during a month, the line extends to the next available data point.

LOCAL MARKET UPDATE - NORTH NAPLES

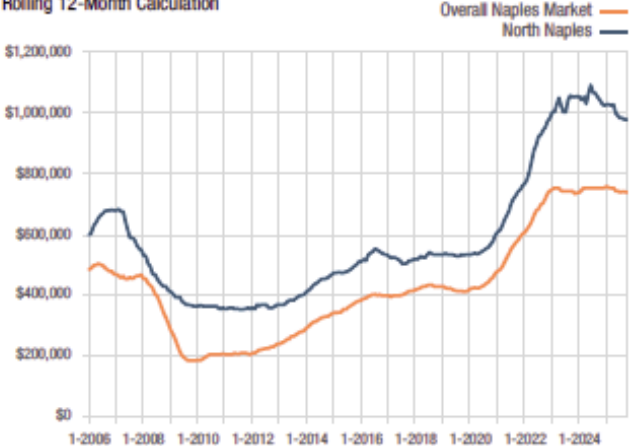
34109, 34110, 34119

Single Family	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	125	145	+ 16.0%	1,367	1,338	- 2.1%
Total Sales	63	80	+ 27.0%	758	786	+ 3.7%
Days on Market Until Sale	74	98	+ 32.4%	61	86	+ 41.0%
Median Closed Price*	\$910,000	\$952,500	+ 4.7%	\$1,025,000	\$967,500	- 5.6%
Average Closed Price*	\$1,401,682	\$1,470,795	+ 4.9%	\$1,504,331	\$1,432,748	- 4.8%
Percent of List Price Received*	93.9%	93.8%	- 0.1%	95.0%	94.2%	- 0.8%
Inventory of Homes for Sale	458	443	- 3.3%	—	—	—
Months Supply of Inventory	6.2	5.8	- 6.5%	—	—	—

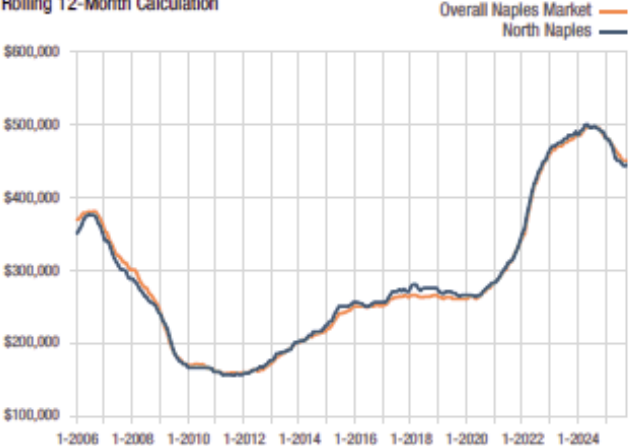
Condo	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	162	188	+ 16.0%	1,631	1,647	+ 1.0%
Total Sales	57	87	+ 52.6%	944	874	- 7.4%
Days on Market Until Sale	73	104	+ 42.5%	65	93	+ 43.1%
Median Closed Price*	\$410,000	\$415,000	+ 1.2%	\$495,000	\$448,725	- 9.3%
Average Closed Price*	\$519,293	\$577,263	+ 11.2%	\$687,052	\$615,247	- 10.5%
Percent of List Price Received*	95.2%	93.8%	- 1.5%	95.9%	94.6%	- 1.4%
Inventory of Homes for Sale	626	668	+ 6.7%	—	—	—
Months Supply of Inventory	7.0	8.0	+ 14.3%	—	—	—

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Median Closed Price - Single Family
Rolling 12-Month Calculation



Median Closed Price - Condo
Rolling 12-Month Calculation



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LOCAL MARKET UPDATE - CENTRAL NAPLES

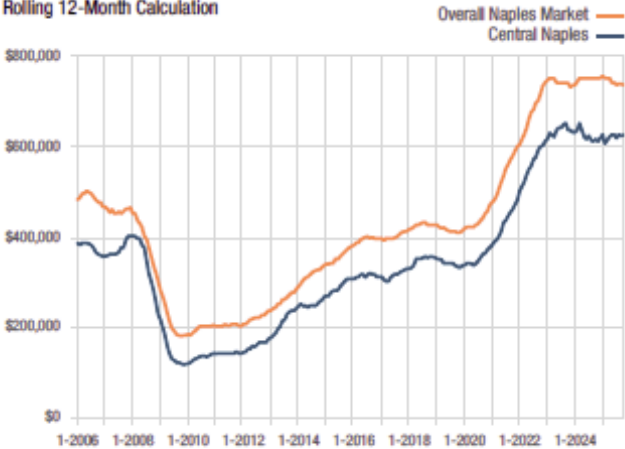
34104, 34105, 34116

Single Family	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	74	79	+ 6.8%	706	734	+ 4.0%
Total Sales	40	44	+ 10.0%	450	453	+ 0.7%
Days on Market Until Sale	66	92	+ 39.4%	63	78	+ 23.8%
Median Closed Price*	\$552,500	\$580,000	+ 5.0%	\$610,000	\$620,000	+ 1.6%
Average Closed Price*	\$1,124,070	\$1,328,746	+ 18.2%	\$1,102,780	\$1,006,246	- 8.8%
Percent of List Price Received*	95.9%	95.2%	- 0.7%	95.7%	95.2%	- 0.5%
Inventory of Homes for Sale	244	230	- 5.7%	—	—	—
Months Supply of Inventory	5.6	5.4	- 3.6%	—	—	—

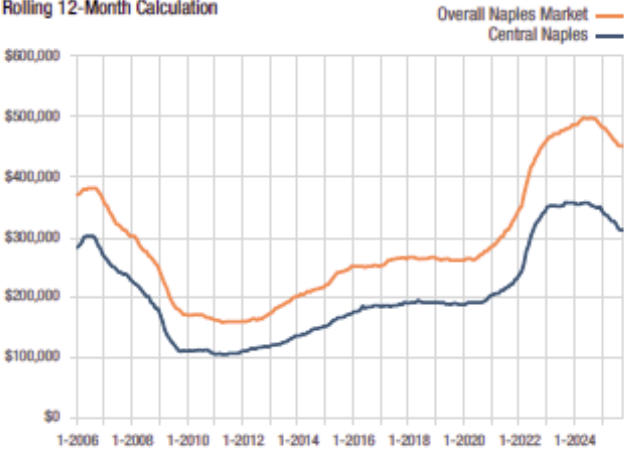
Condo	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	81	107	+ 32.1%	922	901	- 2.3%
Total Sales	29	45	+ 55.2%	479	489	+ 2.1%
Days on Market Until Sale	82	117	+ 42.7%	58	84	+ 44.8%
Median Closed Price*	\$289,000	\$285,000	- 1.4%	\$346,000	\$300,000	- 13.3%
Average Closed Price*	\$348,607	\$362,353	+ 3.9%	\$428,116	\$376,195	- 12.1%
Percent of List Price Received*	95.9%	93.1%	- 2.9%	95.6%	94.2%	- 1.5%
Inventory of Homes for Sale	333	365	+ 9.6%	—	—	—
Months Supply of Inventory	7.2	7.6	+ 5.6%	—	—	—

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Median Closed Price - Single Family
Rolling 12-Month Calculation



Median Closed Price - Condo
Rolling 12-Month Calculation



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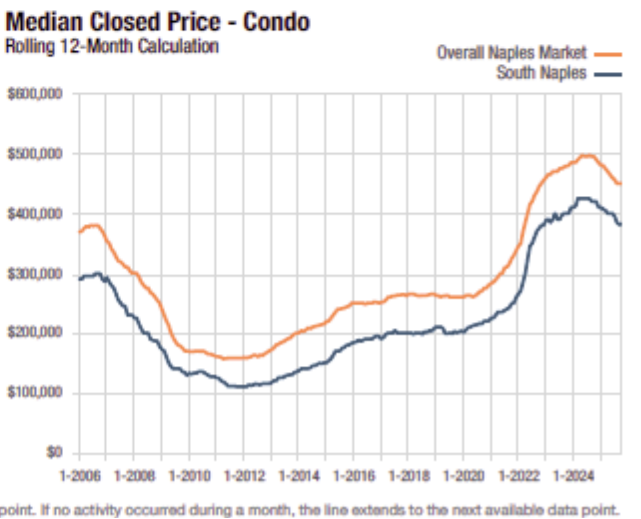
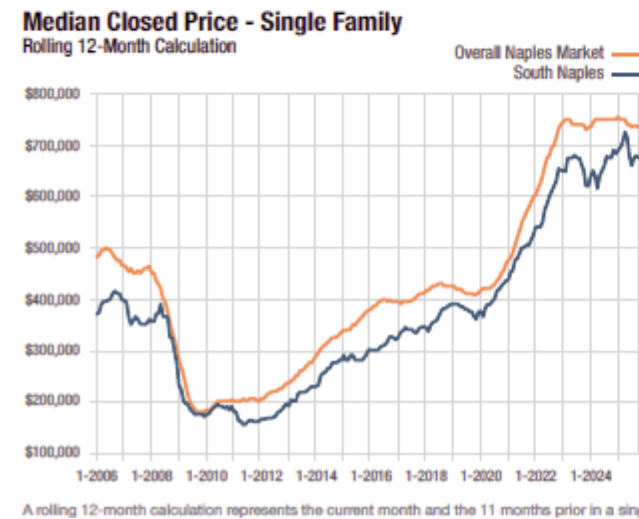
LOCAL MARKET UPDATE - SOUTH NAPLES

34112, 34113

Single Family	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	89	87	- 2.2%	800	824	+ 3.0%
Total Sales	31	47	+ 51.6%	404	425	+ 5.2%
Days on Market Until Sale	81	116	+ 43.2%	65	89	+ 36.9%
Median Closed Price*	\$629,000	\$620,000	- 1.4%	\$682,500	\$675,000	- 1.1%
Average Closed Price*	\$860,581	\$916,939	+ 6.5%	\$1,023,948	\$972,888	- 5.0%
Percent of List Price Received*	96.0%	94.1%	- 2.0%	94.9%	93.2%	- 1.8%
Inventory of Homes for Sale	307	307	0.0%	—	—	—
Months Supply of Inventory	8.0	7.4	- 7.5%	—	—	—

Condo	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	128	183	+ 43.0%	1,377	1,475	+ 7.1%
Total Sales	68	63	- 7.4%	735	713	- 3.0%
Days on Market Until Sale	87	109	+ 25.3%	71	94	+ 32.4%
Median Closed Price*	\$347,500	\$355,000	+ 2.2%	\$415,000	\$383,000	- 7.7%
Average Closed Price*	\$419,399	\$465,332	+ 11.0%	\$474,235	\$442,112	- 6.8%
Percent of List Price Received*	94.8%	94.5%	- 0.3%	95.9%	94.4%	- 1.6%
Inventory of Homes for Sale	521	598	+ 14.8%	—	—	—
Months Supply of Inventory	7.2	8.7	+ 20.8%	—	—	—

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LOCAL MARKET UPDATE - EAST NAPLES

34114, 34117, 34120, 34137

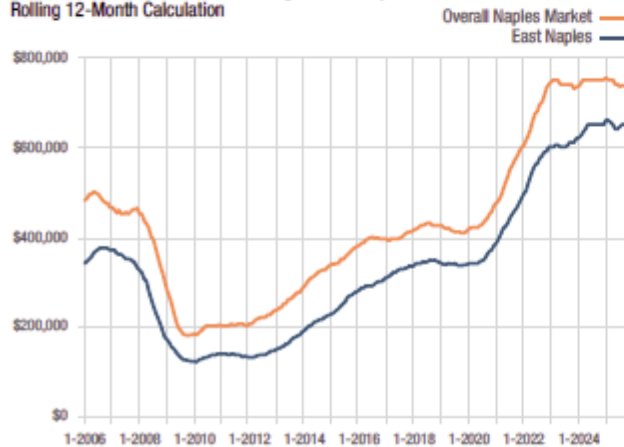
Single Family	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	219	248	+ 13.2%	2,316	2,340	+ 1.0%
Total Sales	102	128	+ 25.5%	1,353	1,316	- 2.7%
Days on Market Until Sale	89	104	+ 16.9%	71	89	+ 25.4%
Median Closed Price*	\$627,000	\$636,000	+ 1.4%	\$650,000	\$645,000	- 0.8%
Average Closed Price*	\$758,152	\$728,755	- 3.9%	\$801,240	\$783,511	- 2.2%
Percent of List Price Received*	96.4%	94.8%	- 1.7%	96.4%	95.6%	- 0.8%
Inventory of Homes for Sale	867	872	+ 0.6%	—	—	—
Months Supply of Inventory	6.7	6.9	+ 3.0%	—	—	—

Condo	October			Year to Date		
Key Metrics	2024	2025	% Change	Thru 10-2024	Thru 10-2025	% Change
New Listings	74	121	+ 63.5%	784	869	+ 10.8%
Total Sales	25	50	+ 100.0%	429	394	- 8.2%
Days on Market Until Sale	116	100	- 13.8%	83	99	+ 19.3%
Median Closed Price*	\$445,000	\$467,500	+ 5.1%	\$512,000	\$454,500	- 11.2%
Average Closed Price*	\$467,863	\$462,088	- 1.2%	\$539,665	\$469,759	- 13.0%
Percent of List Price Received*	95.4%	94.5%	- 0.9%	96.4%	95.0%	- 1.5%
Inventory of Homes for Sale	313	396	+ 26.5%	—	—	—
Months Supply of Inventory	7.3	10.1	+ 38.4%	—	—	—

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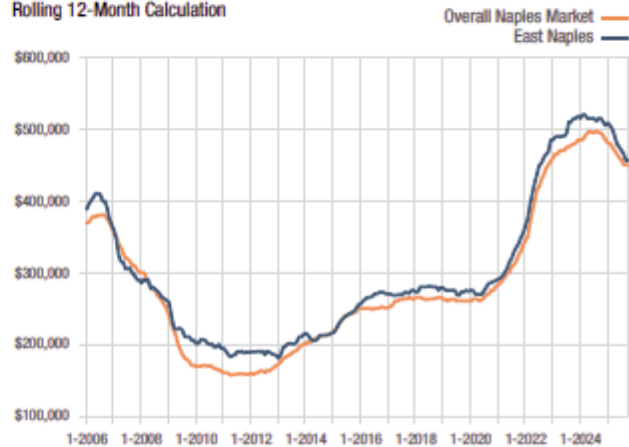
Median Closed Price - Single Family

Rolling 12-Month Calculation



Median Closed Price - Condo

Rolling 12-Month Calculation



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