



**CONNOR
INVESTMENT**

REAL ESTATE

AUGUST 2025

AUSTIN REAL ESTATE MARKET UPDATE

AUSTIN MSA INVENTORY GROWS AS NEW AND EXISTING HOME PRICES COOL.

The Austin – Round Rock Housing Market:

New Home Sales – John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) decreased 9.0% year-over-year to 15,905 closings in June 2025.

New Home Sales Price – The median sales price for new homes in June 2025 was \$382,700, posting a 3.8% decrease.

Existing Single-Family Home Sales - [The Austin Board of Realtors \(ABoR\)](#) reports that existing single-family home sales decreased 7.9% year-over-year to 2,492 home sales across the Austin MSA in July 2025.

Existing Single-Family Home Price - In July 2025, the median sales price for existing single family homes decreased 3.3% year-over-year to be \$435,000.

Vaike O’Grady, research advisor at Unlock MLS, said that, “It’s typical for the summer market to slow as people focus on travel and leisure; we often see activity pick back up once school starts. The year-over-year growth in pending closings is encouraging. Inventory is higher than in recent years, giving buyers more options, but the month-to-month dip in new and active listings suggests some sellers may be holding back.

If interest rates shift lower this fall, we could see seller and buyer activity accelerate.”

The Austin MSA ended July 2025 with 6.1 months of housing inventory, up by 0.9 months year-over-year.

The Austin Economy:

In July 2025, the unemployment rate in the Austin-Round Rock MSA was 3.5%, showing a slight decrease year-over-year by 0.3%.

According to the [Texas Workforce Commission](#), Austin’s non-farm payroll job total as of July 2025 was 1,364,800, a 0.7% increase from July 2024.

In July 2025, the Private Education and Health Services sector led the way with a 3.0% increase year-over-year, followed by Financial Activities with a 2.9% increase.



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SAN ANTONIO REAL ESTATE MARKET UPDATE

THE SAN ANTONIO MSA SEES INCREASES IN NEW HOME SALES AND HOME INVENTORY AS THE FALL MARKET NEARS.

The San Antonio Housing Market:

New Home Sales - John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) saw an increase of 9.0% year-over-year to 19,045 sales in June 2025.

New Home Sales Price - The median sales price of new houses sold in June 2025 was \$309,500, increasing by 2.9% year-over-year.

Existing Single-Family Home Sales - [The San Antonio Board of Realtors \(SABoR\)](#) reports that existing single-family home sales in the San Antonio MSA totaled 2,915 homes in July 2025, decreasing by 10.0%.

Existing Single-Family Home Price - The average price for existing single-family homes in the San Antonio MSA rose 7.0% to be \$401,703 and the median price also rose by 4.0% year-over-year to be \$330,000 in July 2025.

"Prices remain strong, but with increased inventory and longer days on market, buyers are taking the time to weigh their options," said Ed Zapata, SABOR's 2025 Chair of the Board. "Success for both buyers and sellers comes from being prepared and strategic in today's market."

[The San Antonio Board of Realtors \(SABoR\)](#)

reports that months of inventory came in at 6.1 months. Even with rising inventory, Texas' growing population continues to drive the need for more housing.

The San Antonio Economy:

The unemployment rate in the San Antonio MSA decreased by 0.2% year-over-year to be 3.9% in July 2025.

According to the [Texas Workforce Commission \(TWC\)](#), San Antonio's non-farm payroll jobs totaled 1,206,500 in July 2025.

The Texas Workforce Commission reported that the Private Education and Health Services sector led the way with a 5.8% increase year-over-year in July 2025, followed by the Trade, Transportation, and Utilities sector with a 2.7% increase.



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DALLAS - FORT WORTH REAL ESTATE MARKET UPDATE

THE DFW MSA MARKET SEES BOTH NEW AND EXISTING HOME SALES RISE IN AUGUST 2025.

The DFW-Arlington Housing Market:

New Home Sales - John Burns Real Estate Consulting (JBREC) reported that sales of new single-family housing (measured in a trailing 12 months) saw an increase of 2.0% year-over-year to be 43,444 sales in June 2025.

New Home Sales Price - The new home median sales price in June 2025 was \$397,400, a decrease of 4.0% year-over-year.

Existing Single-Family Home Sales - [The Texas A&M Texas Real Estate Research Center](#) reports that existing single-family home sales volume increased 5.0% year-over-year from 8,400 to 8,821 transactions in July 2025. Dollar volume rose from \$4.3 billion to \$4.6 billion.

Existing Single-Family Home Price - The average price of an existing single-family home in the DFW MSA increased 0.5% year-over-year from \$514,915 to \$517,496 in July 2025. The average price per square foot decreased from \$215.30 to \$210.60.

The median price for existing single-family homes saw no change year-over-year to be \$400,000 in July 2025, while the median price per square foot declined from \$199.80 to \$194.30.

Inventory of single-family homes rose year-over-year from 3.9 to 4.9 months of supply in July 2025, but it remains well below a balanced market's inventory of 6-6.5 months.

The DFW-Arlington Economy:

According to the latest figures published by the [Texas Workforce Commission](#), the total number of non-farm jobs for the Dallas - Fort Worth - Arlington MSA was 4,292,600 in July 2025. This marks a 1.0% year-over-year increase.

The unemployment rate in the DFW MSA saw a decrease of 0.2% to be 4.0% in July 2025.

The Private Education and Health Services sector led the way with a 3.3% increase year-over-year, and the Government sector saw the second highest year-over-year gain at 2.6% in July 2025.

	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: JUNE 2025)	15,905 (9.0% < 2024)	19,045 (9.0% > 2024)	43,444 (2.0% > 2024)
NEW HOME MEDIAN SALES PRICE (TTM: JUNE 2025)	\$382,700 (3.8% < 2024)	\$309,500 (2.9% > 2024)	\$397,400 (4.0% < 2024)
EXISTING HOME TOTAL SALES (JULY 2025)	2,492 (7.9% < 2024)	2,915 (10.0% < 2024)	8,821 (5.0% > 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (JULY 2025)	\$435,000 (3.3% < 2024)	\$330,000 (4.0% > 2024)	\$400,000 (NO CHANGE)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (JULY 2025)	6.1 MONTHS	6.1 MONTHS	4.9 MONTHS