

**DECEMBER 2025**

## **AUSTIN REAL ESTATE MARKET UPDATE**

### **AUSTIN MSA INVENTORY REACHES A YEARLY HIGH, SIGNALING A MORE BALANCED MARKET.**

#### **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 13.0% year-over-year to 15,515 closings in October 2025.

New Home Sales Price – The median sales price for new homes in October 2025 was \$391,400, posting a 7.8% decrease.

Existing Single-Family Home Sales - [The Austin Board of Realtors \(ABoR\)](#) reports that existing single-family home sales decreased 15.9% year-over-year to 1,895 home sales across the Austin MSA in November 2025.

Existing Single-Family Home Price - In November 2025, the median sales price for existing single family homes decreased 1.1% year-over-year to be \$430,000.

Brandy Wuensch, 2025 Unlock MLS and ABoR president, said that, “Inventory is growing, prices are steady and buyers are reentering the market with a more strategic mindset. REALTORS® are playing a critical role in helping Central Texans navigate this evolving landscape with confidence. It’s about positioning, not panic.

Buyers finally have options, and sellers need to price their homes competitively based on current market conditions. Even though the pace is slower, Austin is still fundamentally strong.”

The Austin MSA ended November 2025 with 6.3 months of housing inventory, up by 1.5 months year-over-year. This is the highest level recorded in the Austin MSA in over a year.

#### **The Austin Economy:**

In September 2025, the unemployment rate in the Austin-Round Rock MSA was 3.8%, showing a slight increase year-over-year by 0.3%.

According to the [Texas Workforce Commission](#), Austin’s non-farm payroll job total as of September 2025 was 1,371,100, a 0.7% increase from September 2024.

In September 2025, the Financial Activities sector led the way with a 3.0% increase year-over-year, followed by the Government sector with a 2.0% increase.

	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: OCTOBER 2025)	15,515 (13.0% < 2024)	18,649 (1.0% > 2024)	43,421 (NO CHANGE)
NEW HOME MEDIAN SALES PRICE (TTM: OCTOBER 2025)	\$391,400 (7.8% < 2024)	\$316,900 (5.9% > 2024)	\$396,200 (9.3% < 2024)
EXISTING HOME TOTAL SALES (NOVEMBER 2025)	1,895 (15.9% < 2024)	2,206 (19.0% < 2024)	5,961 (8.0% > 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (NOVEMBER 2025)	\$430,000 (1.1% < 2024)	\$315,000 (5.0% > 2024)	\$375,000 (5.1% < 2024)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (NOVEMBER 2025)	6.3 MONTHS	5.9 MONTHS	4.1 MONTHS