



JANUARY 2026

AUSTIN REAL ESTATE MARKET UPDATE

THE AUSTIN HOUSING MARKET IS TRANSITIONING INTO A MORE BALANCED, BUYER-FRIENDLY ENVIRONMENT, CHARACTERIZED BY INCREASED INVENTORY AND MODERATED HOME PRICES.

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 14.0% year-over-year to 15,231 closings in November 2025.

New Home Sales Price - The median sales price for new homes in November 2025 was \$385,000, posting a 4.7% decrease.

Existing Single-Family Home Sales - [The Austin Board of Realtors \(ABoR\)](#) reports that existing single-family home sales increased 1.9% year-over-year to 2,514 home sales across the Austin MSA in December 2025.

Existing Single-Family Home Price - In December 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, points out that, “2025 wasn’t a year defined by urgency. It was defined by adjustment. Early in the year, we saw the effects of rate sensitivity, price hesitations and a flood of new listings that pushed inventory higher. As the year went on, sellers recalibrated, buyers reengaged and the pace of the market continued to normalize. December 2025 numbers confirmed that shift.”

The Austin MSA ended December 2025 with 4.2 months of housing inventory, up by 0.4 months year-over-year.

The Austin Economy:

In December 2025, the unemployment rate in the Austin-Round Rock MSA was 3.2%, showing a slight increase year-over-year by 0.1%.

According to the [Texas Workforce Commission](#), Austin’s non-farm payroll job total as of December 2025 was 1,389,400, a 0.7% increase from December 2024.

In December 2025, the Government sector led the way with a 3.4% increase year-over-year, followed by the Private Education and Health Services sector with a 2.5% increase.

	AUSTIN	SAN ANTONIO	DFW
NEW HOME TOTAL SALES (TTM: NOVEMBER 2025)	15,231 (14.0% < 2024)	18,393 (2.0% < 2024)	42,858 (2.0% < 2024)
NEW HOME MEDIAN SALES PRICE (TTM: NOVEMBER 2025)	\$385,000 (4.7% < 2024)	\$305,900 (2.2% < 2024)	\$396,300 (8.1% < 2024)
EXISTING HOME TOTAL SALES (DECEMBER 2025)	2,514 (1.9% > 2024)	2,854 (8.0% > 2024)	7,286 (3.4% > 2024)
EXISTING HOME SINGLE-FAMILY MEDIAN SALES PRICE (DECEMBER 2025)	\$435,000 (3.3% < 2024)	\$309,990 (2.0% < 2024)	\$378,000 (5.5% < 2024)
EXISTING HOME SINGLE-FAMILY MONTHS INVENTORY (DECEMBER 2025)	4.2 MONTHS	5.3 MONTHS	3.4 MONTHS