

# Elliman Report

## Q4-2025 Lee County, FL Sales

### Single Family Dashboard

YEAR-OVER-YEAR

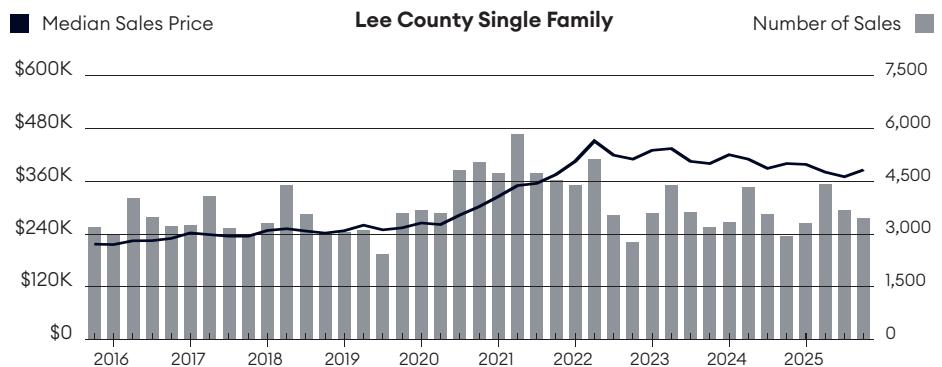
- 3.6% **Prices** Median Sales Price
- + 17.3% **Sales** Closed Sales
- 4.3% **Inventory** Total Inventory
- + 11 days **Marketing Time** Days on Market

**Condo Dashboard**

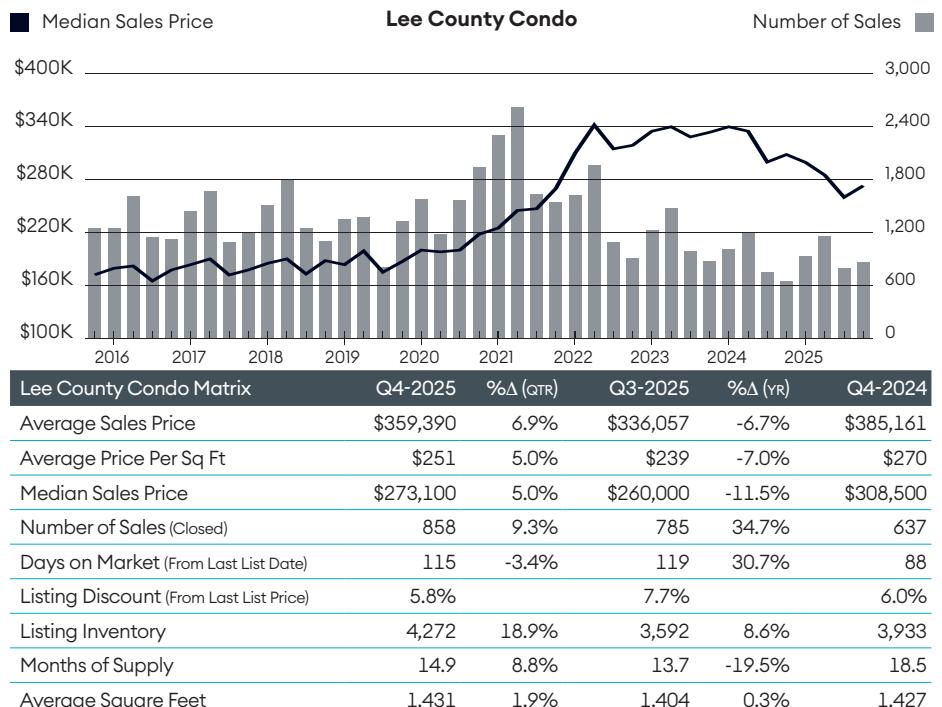
YEAR-OVER-YEAR

- 11.5% **Prices** Median Sales Price
- + 34.7% **Sales** Closed Sales
- + 8.6% **Inventory** Total Inventory
- + 27 days **Marketing Time** Days on Market

- Single family sales surged as listing inventory declined annually
- Condo sales surged as price trend indicators declined year over year



Lee County Single Family Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$509,581	5.9%	\$481,358	-6.7%	\$546,337
Average Price Per Sq Ft	\$266	4.3%	\$255	-6.0%	\$283
Median Sales Price	\$385,709	4.2%	\$370,000	-3.6%	\$400,000
Number of Sales (Closed)	3,448	-6.3%	3,678	17.3%	2,939
Days on Market (From Last List Date)	86	3.6%	83	14.7%	75
Listing Discount (From Last List Price)	4.7%		5.3%		4.5%
Listing Inventory	7,821	9.2%	7,161	-4.3%	8,172
Months of Supply	6.8	17.2%	5.8	-18.1%	8.3
Average Square Feet	1,915	1.6%	1,884	-0.8%	1,930



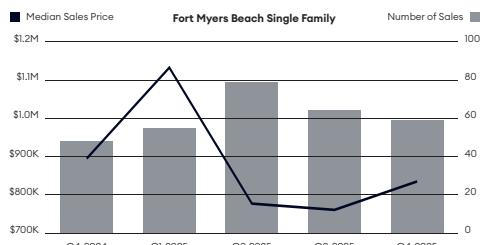
DouglasElliman

Single family sales increased, and listing inventory declined, aided by the decline in mortgage rates and robust financial markets. The number of single family sales surged by 17.3% year over year to 3,448. Listing inventory of single families was challenged by the burst in sales, falling 4.3% annually to 7,821. Months of

supply, the number of months to sell all single family listings at the current sales rate, was 6.8, 18.1% faster than the same period last year. The median sales price for single family homes fell by 3.6% year over year to \$385,709. Condo sales also surged annually, rising by 34.7% to 858. Meanwhile, listing inventory rose by

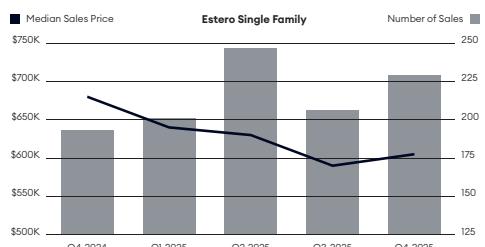
8.6% annually. The combination accelerated the market pace by 19.5% to 14.9 months. The Fort Myers Beach single family market had a median sales price of \$645,000, down by 7.9% from the same quarter last year as listing inventory rose by 11.2% to 159.

## Fort Myers Beach Single Family



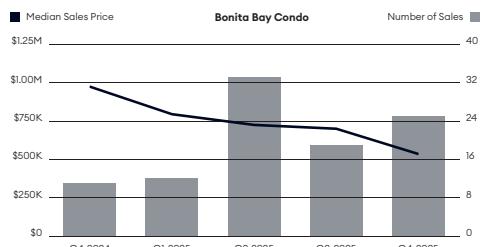
Fort Myers Beach Single Family Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$835,315	9.8%	\$761,053	-6.7%	\$895,125
Average Price per Sq Ft	\$566	6.6%	\$531	0.7%	\$562
Median Sales Price	\$645,000	-6.5%	\$689,500	-7.9%	\$700,000
Number of Sales (Closed)	59	-7.8%	64	22.9%	48
Days on Market (From Last List Date)	137	16.1%	118	53.9%	89
Listing Discount (From Last List Price)	8.9%		10.4%		8.2%
Listing Inventory	159	7.4%	148	11.2%	143
Months of Supply	8.1	17.4%	6.9	-9.0%	8.9
Average Square Feet	1,475	2.9%	1,433	-7.4%	1,593

## Estero Single Family



Estero Single Family Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$713,144	0.7%	\$708,110	-11.3%	\$804,082
Average Price per Sq Ft	\$308	5.1%	\$293	-6.1%	\$328
Median Sales Price	\$605,000	2.5%	\$590,000	-11.0%	\$680,000
Number of Sales (Closed)	\$229	11.2%	\$206	18.7%	\$193
Days on Market (From Last List Date)	80	-5.9%	85	14.3%	70
Listing Discount (From Last List Price)	4.4%		5.0%		4.6%
Listing Inventory	348	3.3%	337	-6.5%	372
Months of Supply	4.6	-6.1%	4.9	-20.7%	5.8
Average Square Feet	2,317	-4.3%	2,420	-5.5%	2,451

## Bonita Bay Condo



Bonita Bay Condo Matrix	Q4-2025	%Δ (QTR)	Q3-2025	%Δ (YR)	Q4-2024
Average Sales Price	\$908,748	-12.7%	\$1,041,289	-41.1%	\$1,544,000
Average Price per Sq Ft	\$413	-1.0%	\$417	-26.1%	\$559
Median Sales Price	\$534,900	-23.6%	\$700,000	-45.1%	\$975,000
Number of Sales (Closed)	25	31.6%	19	127.3%	11
Days on Market (From Last List Date)	162	42.1%	114	28.6%	126
Listing Discount (From Last List Price)	5.6%		7.1%		5.8%
Listing Inventory	150	89.9%	79	23.0%	122
Months of Supply	18.0	44.0%	12.5	-45.9%	33.3
Average Square Feet	2,201	-11.9%	2,499	-20.4%	2,764

## By Sales Share Lee County

Finance	Current Quarter	Prior Year Quarter
Single Family Cash	30.8%	30.7%
Single Family Mortgage	69.2%	69.3%
Condo Cash	66.4%	65.0%
Condo Mortgage	33.6%	35.0%

Price	Current Quarter	Prior Year Quarter	Over/Under Last List	Current Quarter	Prior Year Quarter
Single Family Under \$500K	67.6%	67.2%	Single Family Over	6.5%	7.2%
Single Family \$500K - \$1M	25.9%	25.6%	Single Family At	25.9%	25.6%
Single Family Over \$1M	6.5%	7.2%	Single Family Under	67.6%	67.2%
Condo Under \$500K	85.2%	82.4%	Condo Over	3.8%	3.3%
Condo \$500K-\$1M	11.0%	14.3%	Condo At	11.0%	14.3%
Condo Over \$1M	3.8%	3.3%	Condo Under	85.2%	82.4%

Questions or comments? Email report author Jonathan Miller at jmiller@millersamuel.com Methodology: millersamuel.com/research-reports/methodology

**Douglas Elliman Real Estate**  
800 Harbour Drive,  
Naples, FL 34103  
239.799.5300 • elliman.com

**Miller Samuel Real Estate Appraisers & Consultants**  
21 West 38th Street, New York, NY 10018  
212.768.8100 • millersamuel.com