

Monthly Indicators

Greater Hartford Association of REALTORS®



December 2025

U.S. existing home sales ticked up 0.5% from the previous month to a seasonally adjusted annual rate of 4.13 million, marking the third consecutive monthly increase, according to the National Association of REALTORS® (NAR). However, sales were down 1.0% from the same period last year. Regionally, sales rose month-over-month in the Northeast and South, were unchanged in the West, and declined in the Midwest. On a year-over-year basis, sales were flat in the Northeast and South and fell in both the Midwest and West.

New Listings decreased 15.4 percent for Single Family homes but increased 1.3 percent for Townhouse/Condo homes. Pending Sales decreased 3.9 percent for Single Family homes but increased 10.1 percent for Townhouse/Condo homes. Inventory decreased 5.2 percent for Single Family homes but increased 12.1 percent for Townhouse/Condo homes.

Median Sales Price increased 5.5 percent to \$406,000 for Single Family homes and 1.0 percent to \$287,900 for Townhouse/Condo homes. Days on Market decreased 12.0 percent for Single Family homes but increased 22.2 percent for Townhouse/Condo homes. Months Supply of Inventory decreased 7.1 percent for Single Family homes but increased 15.4 percent for Townhouse/Condo homes.

The national median existing-home price continued to climb, rising 1.2% from a year ago to \$409,200, according to NAR. This year-over-year increase—the 29th consecutive monthly gain—reflects ongoing tightness in housing supply. At the end of November, there were 1.43 million units for sale, down 5.9% from the previous month but up 7.5% from the same time last year, representing a 4.2-month supply at the current sales pace.

Quick Facts

- 2.4% **0.0%** **- 1.4%**

Change in
Closed Sales
All Properties

Change in
Median Sales Price
All Properties

Change in
Homes for Sale
All Properties

This report covers residential real estate activity in the Greater Hartford Association of REALTORS® Association service area. Percent changes are calculated using rounded figures.

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Single Family Market Overview

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



Key Metrics	Historical Sparkbars	12-2024		12-2025	% Change	YTD 2024	YTD 2025	% Change
		12-2023	6-2024	12-2024	6-2025	12-2025	12-2024	12-2025
New Listings		254	215	- 15.4%	5,630	5,629	- 0.0%	
Pending Sales		310	298	- 3.9%	4,787	4,786	- 0.0%	
Closed Sales		414	384	- 7.2%	4,822	4,757	- 1.3%	
Days on Market Until Sale		25	22	- 12.0%	20	19	- 5.0%	
Median Sales Price		\$385,000	\$406,000	+ 5.5%	\$395,000	\$418,000	+ 5.8%	
Average Sales Price		\$459,725	\$487,919	+ 6.1%	\$460,567	\$492,628	+ 7.0%	
Percent of List Price Received		102.9%	102.9%	0.0%	105.3%	105.0%	- 0.3%	
Housing Affordability Index		109	108	- 0.9%	106	105	- 0.9%	
Inventory of Homes for Sale		563	534	- 5.2%	—	—	—	
Months Supply of Inventory		1.4	1.3	- 7.1%	—	—	—	

Townhouse/Condo Market Overview

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



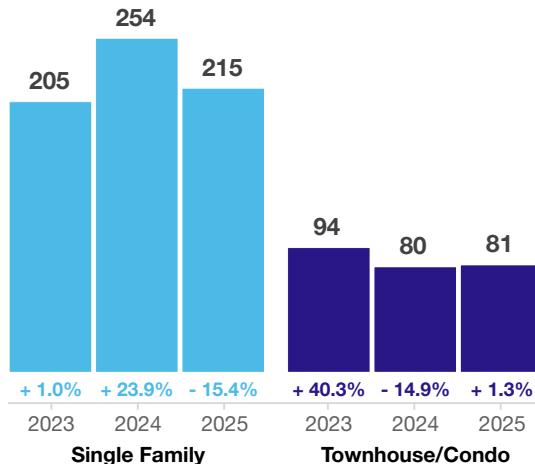
Key Metrics	Historical Sparkbars	12-2024		12-2025		% Change	YTD 2024	YTD 2025	% Change
		12-2024	12-2025	12-2024	12-2025				
New Listings		80	81	+ 1.3%	1,639	1,657	+ 1.1%		
Pending Sales		99	109	+ 10.1%	1,434	1,427	- 0.5%		
Closed Sales		122	139	+ 13.9%	1,424	1,444	+ 1.4%		
Days on Market Until Sale		18	22	+ 22.2%	17	17	0.0%		
Median Sales Price		\$285,000	\$287,900	+ 1.0%	\$280,000	\$290,000	+ 3.6%		
Average Sales Price		\$318,796	\$311,428	- 2.3%	\$298,056	\$311,410	+ 4.5%		
Percent of List Price Received		103.4%	101.4%	- 1.9%	104.7%	103.0%	- 1.6%		
Housing Affordability Index		148	155	+ 4.7%	151	154	+ 2.0%		
Inventory of Homes for Sale		157	176	+ 12.1%	—	—	—		
Months Supply of Inventory		1.3	1.5	+ 15.4%	—	—	—		

New Listings

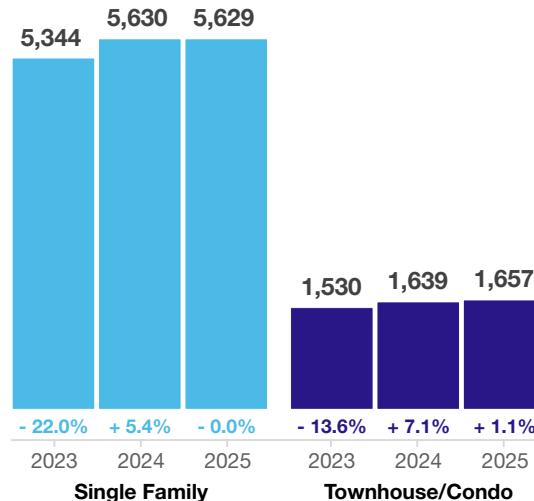
A count of the properties that have been newly listed on the market in a given month.



December

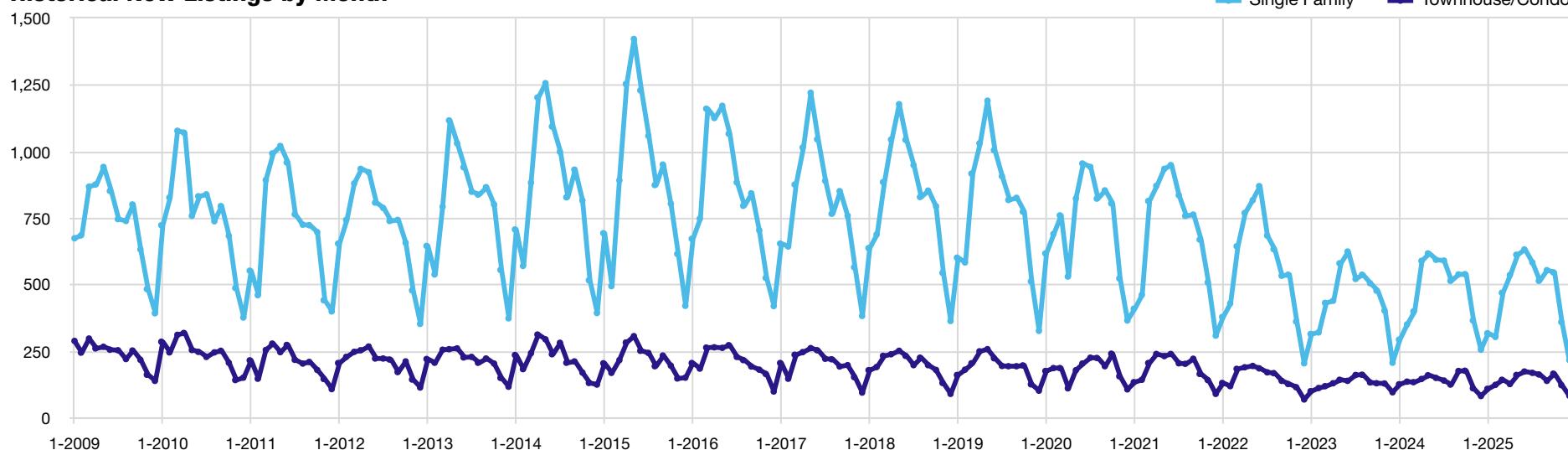


Year to Date



	New Listings	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	316	316	+ 8.2%	107	- 13.7%
Feb-2025	302	302	- 13.5%	122	- 9.0%
Mar-2025	468	468	+ 17.6%	141	+ 6.8%
Apr-2025	535	535	- 9.0%	125	- 13.2%
May-2025	611	611	- 0.8%	159	+ 0.6%
Jun-2025	631	631	+ 6.6%	172	+ 16.2%
Jul-2025	582	582	- 1.2%	167	+ 21.0%
Aug-2025	513	513	0.0%	161	+ 30.9%
Sep-2025	553	553	+ 3.0%	137	- 21.3%
Oct-2025	545	545	+ 1.3%	164	- 6.3%
Nov-2025	358	358	- 1.6%	121	+ 11.0%
Dec-2025	215	215	- 15.4%	81	+ 1.3%
12-Month Avg	469	469	0.0%	138	+ 0.7%

Historical New Listings by Month

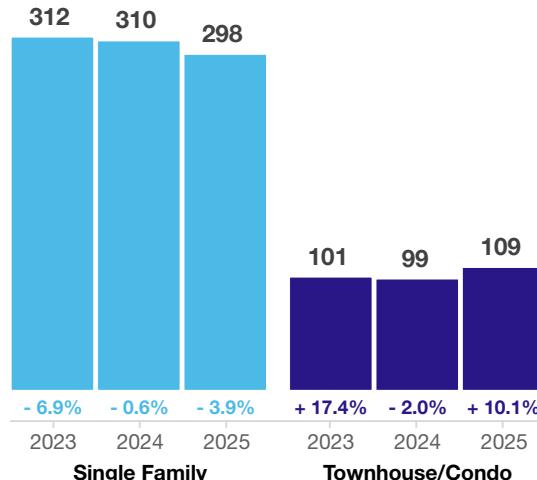


Pending Sales

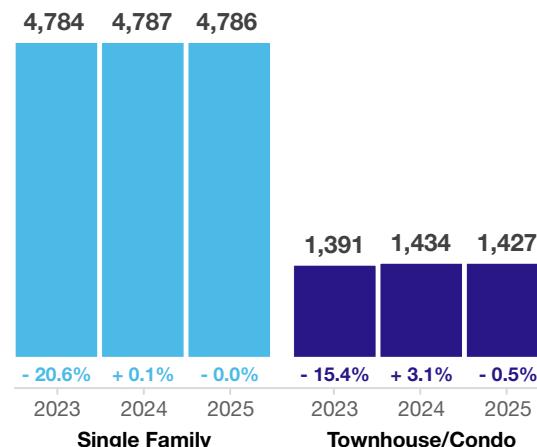
A count of the properties on which offers have been accepted in a given month.



December

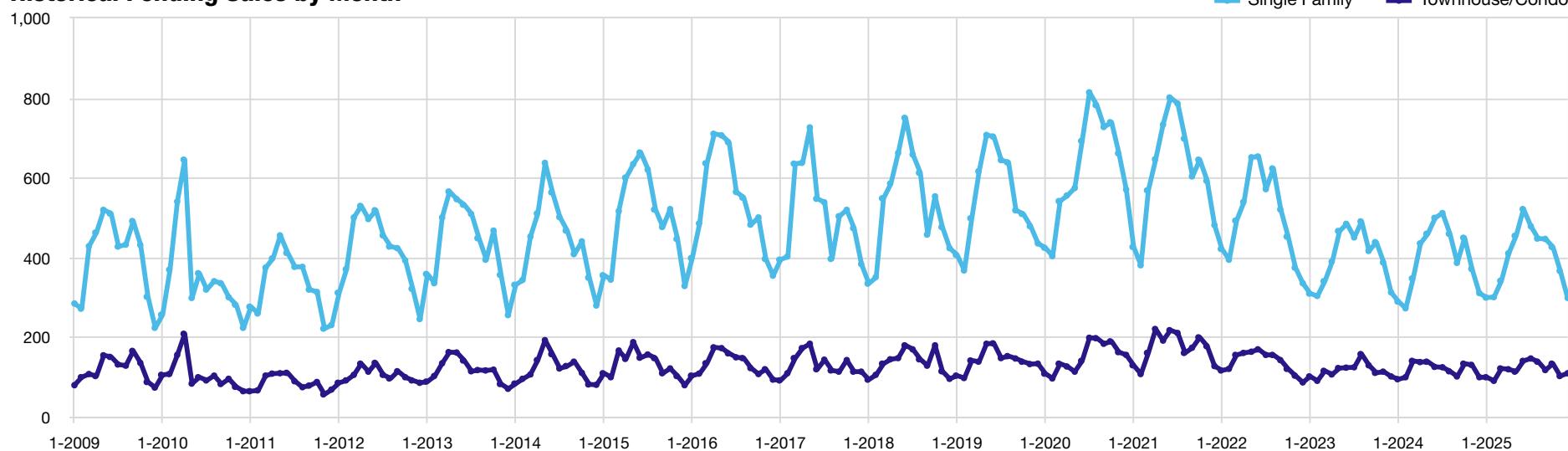


Year to Date



Pending Sales	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	299	+ 3.5%	99	+ 5.3%
Feb-2025	300	+ 10.3%	90	- 9.1%
Mar-2025	341	- 1.7%	121	- 13.6%
Apr-2025	410	- 5.7%	119	- 13.1%
May-2025	454	- 1.1%	113	- 18.1%
Jun-2025	521	+ 4.4%	140	+ 12.0%
Jul-2025	478	- 6.5%	146	+ 17.7%
Aug-2025	447	- 2.6%	138	+ 21.1%
Sep-2025	446	+ 15.5%	117	+ 15.8%
Oct-2025	426	- 5.1%	133	0.0%
Nov-2025	366	- 1.3%	102	- 21.5%
Dec-2025	298	- 3.9%	109	+ 10.1%
12-Month Avg	399	0.0%	119	- 0.8%

Historical Pending Sales by Month

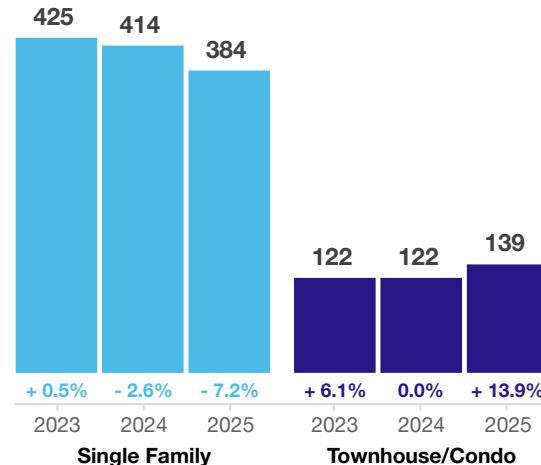


Closed Sales

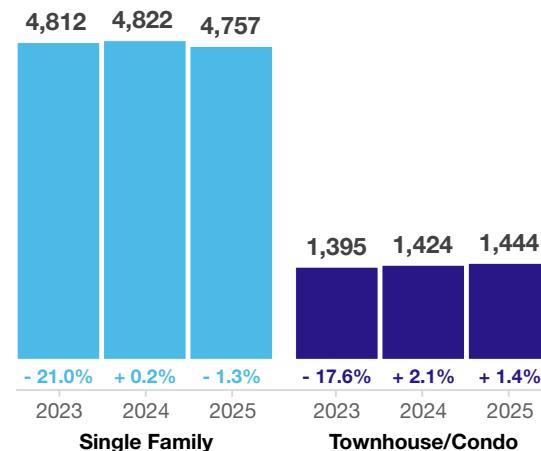
A count of the actual sales that closed in a given month.



December

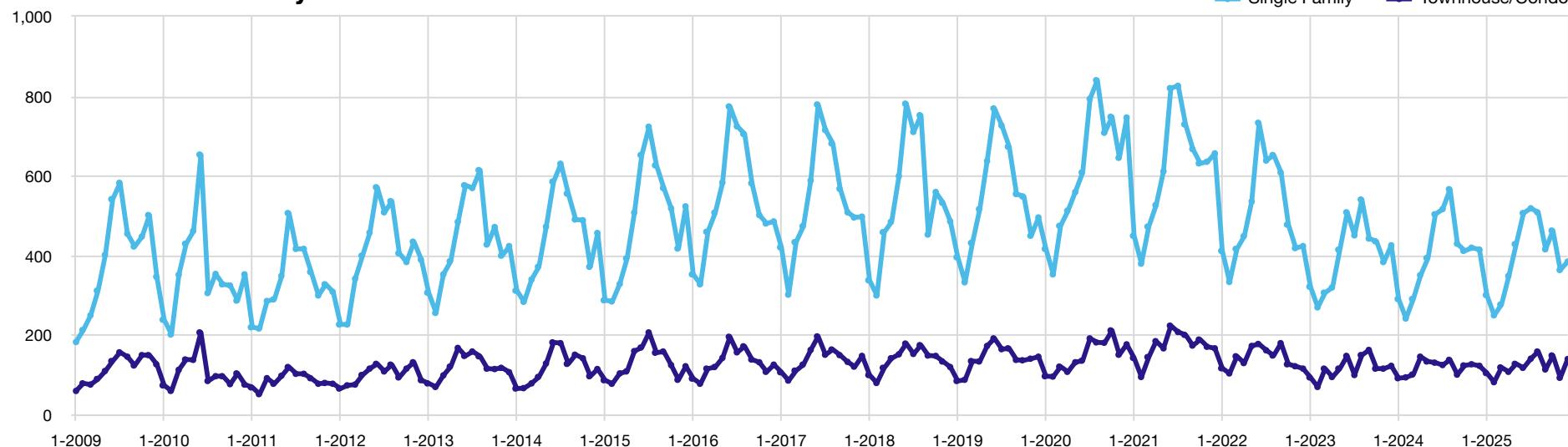


Year to Date



Closed Sales	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	300	+ 3.4%	104	+ 14.3%
Feb-2025	249	+ 3.3%	81	- 12.9%
Mar-2025	276	- 4.8%	118	+ 18.0%
Apr-2025	348	- 0.6%	107	- 26.2%
May-2025	428	+ 8.9%	127	- 4.5%
Jun-2025	506	+ 0.6%	117	- 10.0%
Jul-2025	518	+ 0.4%	140	+ 12.9%
Aug-2025	508	- 10.2%	158	+ 15.3%
Sep-2025	415	- 3.3%	113	+ 13.0%
Oct-2025	462	+ 12.4%	148	+ 20.3%
Nov-2025	363	- 13.4%	92	- 27.0%
Dec-2025	384	- 7.2%	139	+ 13.9%
12-Month Avg	396	- 1.5%	120	+ 0.8%

Historical Closed Sales by Month

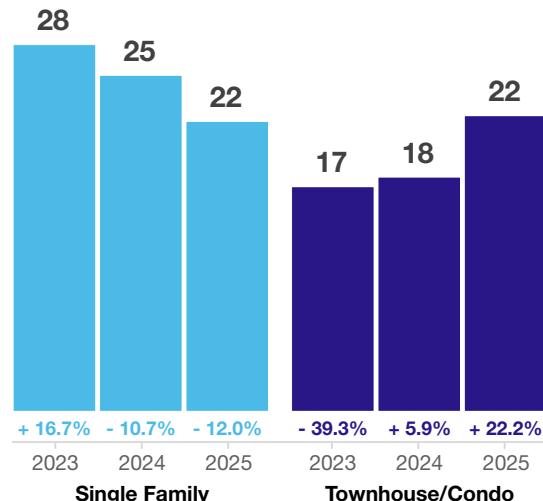


Days on Market Until Sale

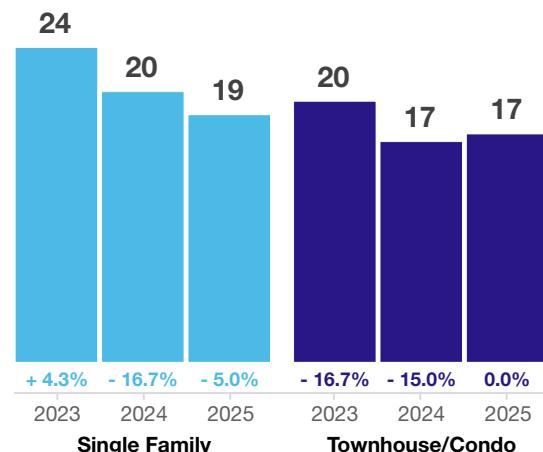
Average number of days between when a property is listed and when an offer is accepted in a given month.



December



Year to Date

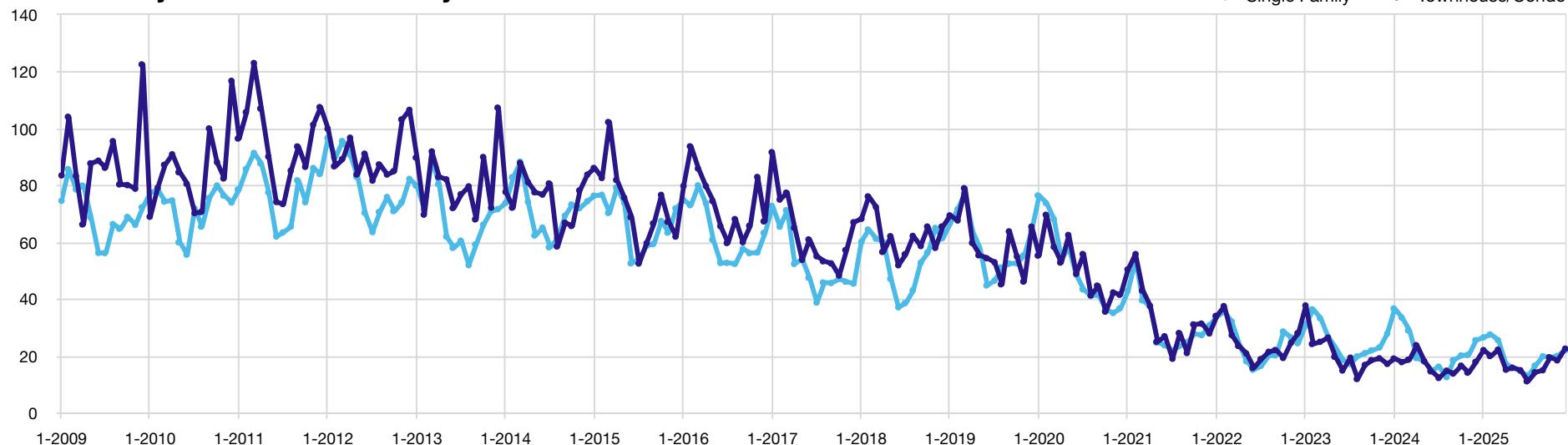


Days on Market	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	26	- 29.7%	22	+ 15.8%
Feb-2025	27	- 18.2%	20	+ 11.1%
Mar-2025	25	- 13.8%	22	+ 15.8%
Apr-2025	17	- 10.5%	15	- 37.5%
May-2025	16	- 11.1%	16	- 11.1%
Jun-2025	15	0.0%	15	+ 7.1%
Jul-2025	13	- 18.8%	11	- 8.3%
Aug-2025	16	+ 33.3%	14	- 6.7%
Sep-2025	20	+ 11.1%	15	+ 7.1%
Oct-2025	19	- 5.0%	19	+ 18.8%
Nov-2025	20	0.0%	18	+ 28.6%
Dec-2025	22	- 12.0%	22	+ 22.2%
12-Month Avg*	19	- 8.0%	17	+ 3.4%

* Days on Market for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

Single Family Townhouse/Condo

Historical Days on Market Until Sale by Month

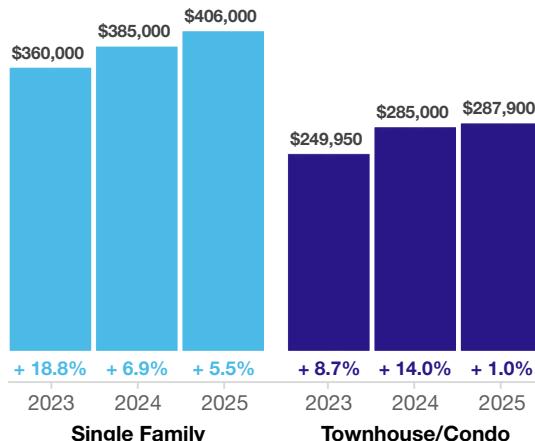


Median Sales Price

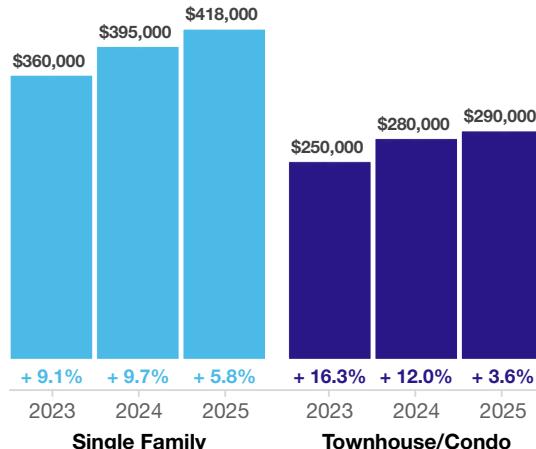
Point at which half of the sales sold for more and half sold for less, not accounting for seller concessions, in a given month.



December



Year to Date

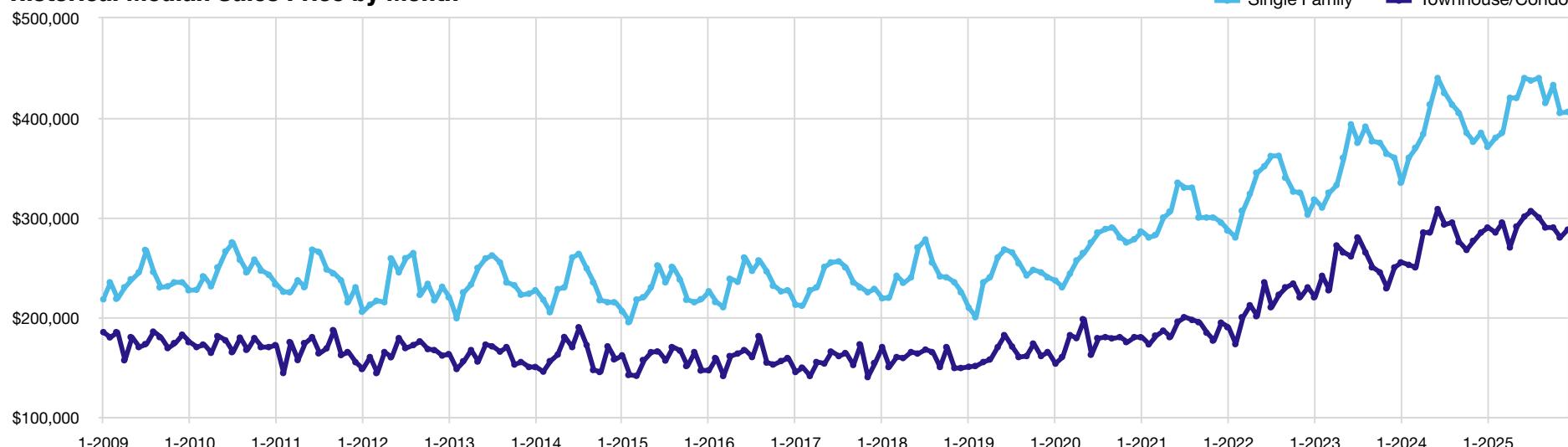


Median Sales Price	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	\$371,000	+ 10.8%	\$289,950	+ 13.7%
Feb-2025	\$380,000	+ 5.6%	\$285,000	+ 12.9%
Mar-2025	\$385,000	+ 4.1%	\$295,000	+ 18.0%
Apr-2025	\$420,169	+ 9.5%	\$270,000	- 5.3%
May-2025	\$420,000	+ 1.6%	\$291,000	+ 2.1%
Jun-2025	\$440,000	0.0%	\$301,000	- 2.4%
Jul-2025	\$437,500	+ 2.9%	\$306,500	+ 4.6%
Aug-2025	\$440,000	+ 6.5%	\$300,000	+ 1.7%
Sep-2025	\$415,000	+ 2.5%	\$290,000	+ 5.3%
Oct-2025	\$433,000	+ 12.5%	\$290,000	+ 8.4%
Nov-2025	\$405,000	+ 7.7%	\$280,000	+ 1.2%
Dec-2025	\$406,000	+ 5.5%	\$287,900	+ 1.0%
12-Month Avg*	\$418,000	+ 5.8%	\$290,000	+ 3.6%

* Median Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

— Single Family — Townhouse/Condo

Historical Median Sales Price by Month

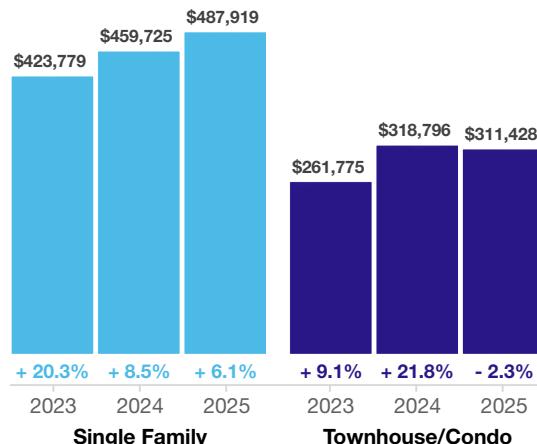


Average Sales Price

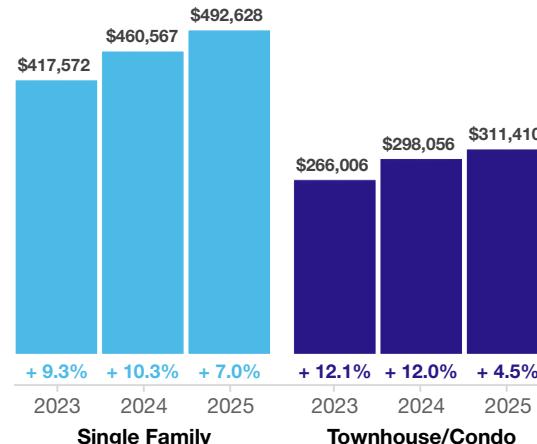
Average sales price for all closed sales, not accounting for seller concessions, in a given month.



December



Year to Date

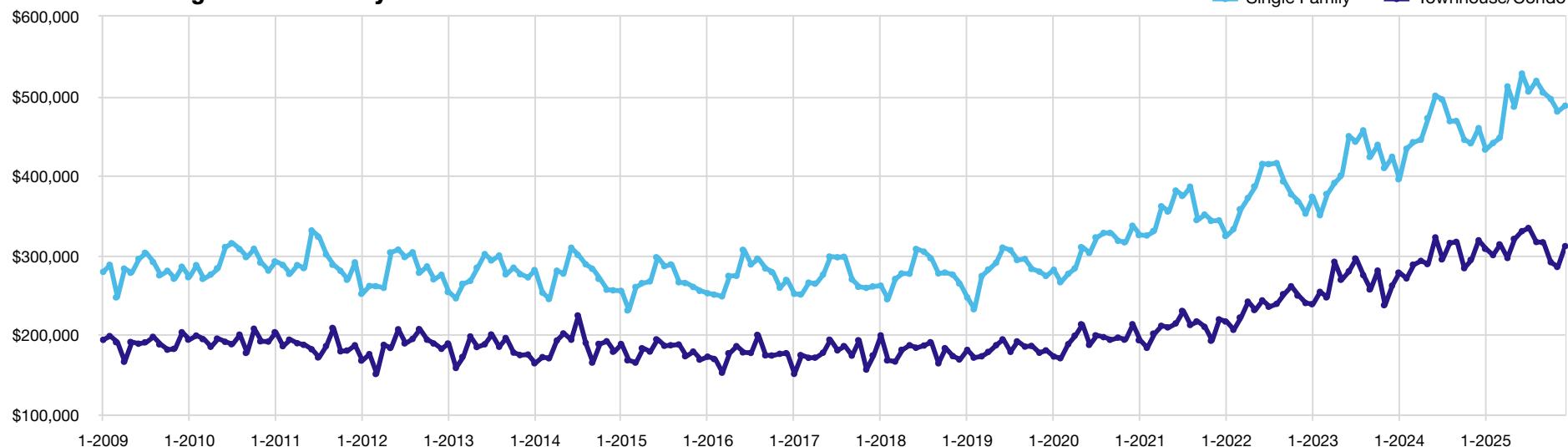


Avg. Sales Price	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	\$432,829	+ 9.4%	\$308,139	+ 10.8%
Feb-2025	\$441,073	+ 1.6%	\$300,208	+ 10.8%
Mar-2025	\$447,562	+ 1.2%	\$313,629	+ 8.9%
Apr-2025	\$512,168	+ 15.0%	\$296,587	+ 1.3%
May-2025	\$486,703	+ 3.1%	\$320,529	+ 10.9%
Jun-2025	\$528,365	+ 5.6%	\$330,258	+ 2.4%
Jul-2025	\$505,807	+ 2.0%	\$334,206	+ 13.4%
Aug-2025	\$519,119	+ 10.8%	\$316,669	+ 0.4%
Sep-2025	\$504,662	+ 7.7%	\$316,314	- 0.1%
Oct-2025	\$496,360	+ 11.5%	\$291,335	+ 2.7%
Nov-2025	\$480,694	+ 9.1%	\$285,327	- 3.0%
Dec-2025	\$487,919	+ 6.1%	\$311,428	- 2.3%
12-Month Avg*	\$492,628	+ 7.0%	\$311,410	+ 4.5%

* Avg. Sales Price for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

— Single Family — Townhouse/Condo

Historical Average Sales Price by Month

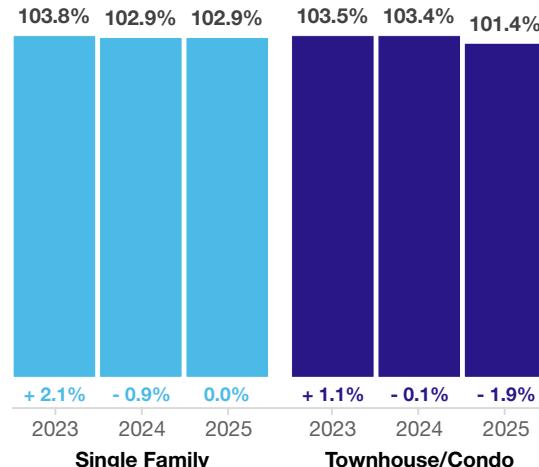


Percent of List Price Received

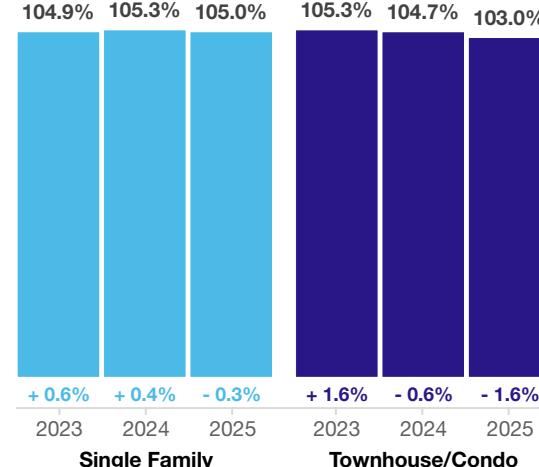
Percentage found when dividing a property's sales price by its most recent list price, then taking the average for all properties sold in a given month, not accounting for seller concessions.



December



Year to Date

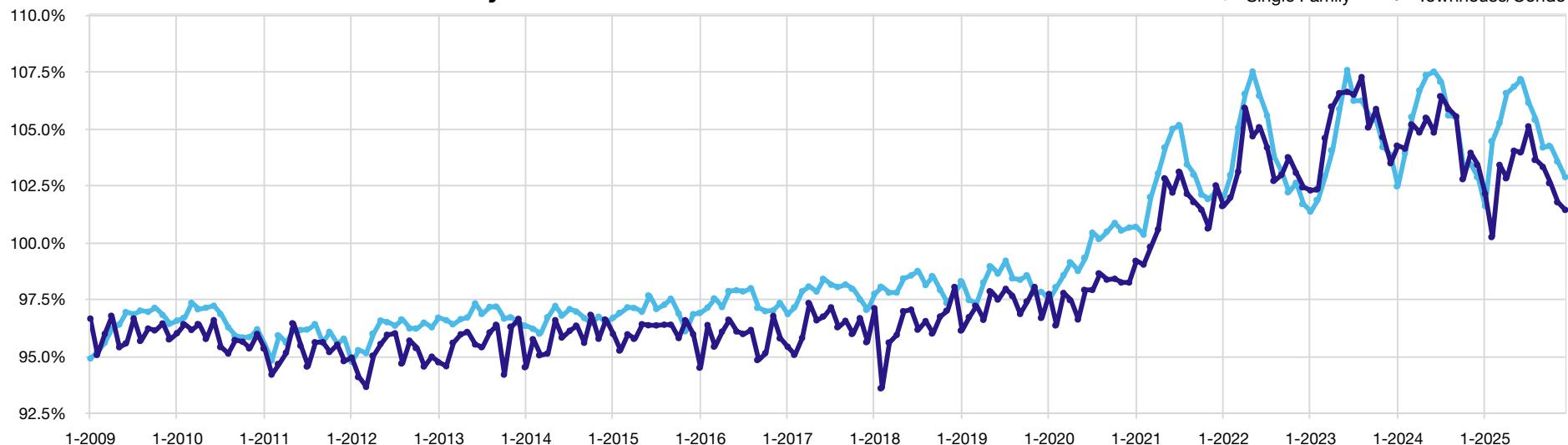


Pct. of List Price Received*	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	101.6%	- 0.9%	102.1%	- 2.0%
Feb-2025	104.4%	+ 0.5%	100.2%	- 3.7%
Mar-2025	105.2%	- 0.3%	103.4%	- 1.7%
Apr-2025	106.6%	- 0.1%	102.8%	- 1.9%
May-2025	106.8%	- 0.5%	104.0%	- 1.4%
Jun-2025	107.2%	- 0.3%	103.9%	- 0.9%
Jul-2025	106.1%	- 0.9%	105.1%	- 1.2%
Aug-2025	105.4%	- 0.2%	103.6%	- 2.2%
Sep-2025	104.2%	- 1.2%	103.3%	- 2.1%
Oct-2025	104.2%	+ 0.8%	102.6%	- 0.2%
Nov-2025	103.5%	+ 0.1%	101.8%	- 2.0%
Dec-2025	102.9%	0.0%	101.4%	- 1.9%
12-Month Avg*	105.0%	- 0.2%	103.0%	- 1.7%

* Pct. of List Price Received for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

— Single Family — Townhouse/Condo

Historical Percent of List Price Received by Month

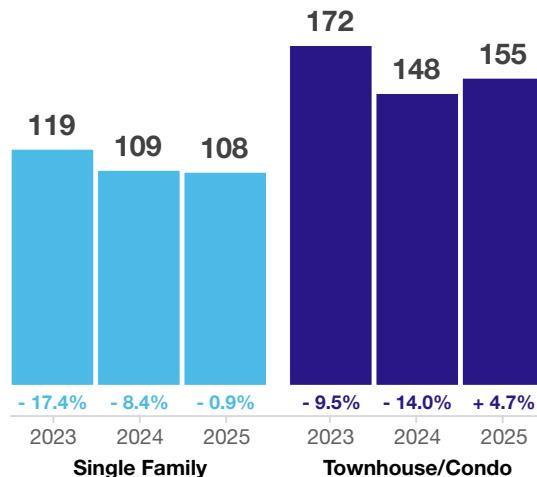


Housing Affordability Index

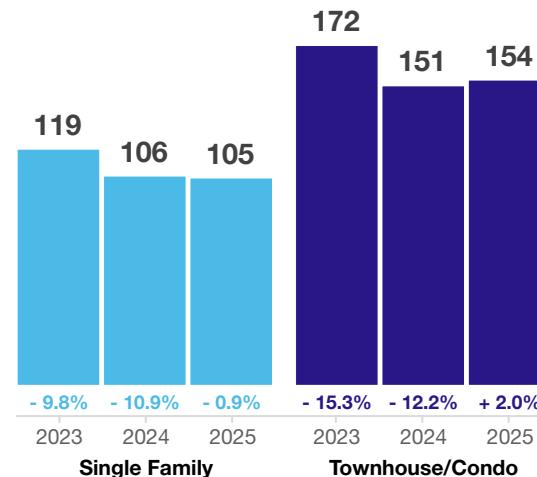
This index measures housing affordability for the region. For example, an index of 120 means the median household income is 120% of what is necessary to qualify for the median-priced home under prevailing interest rates. A higher number means greater affordability.



December

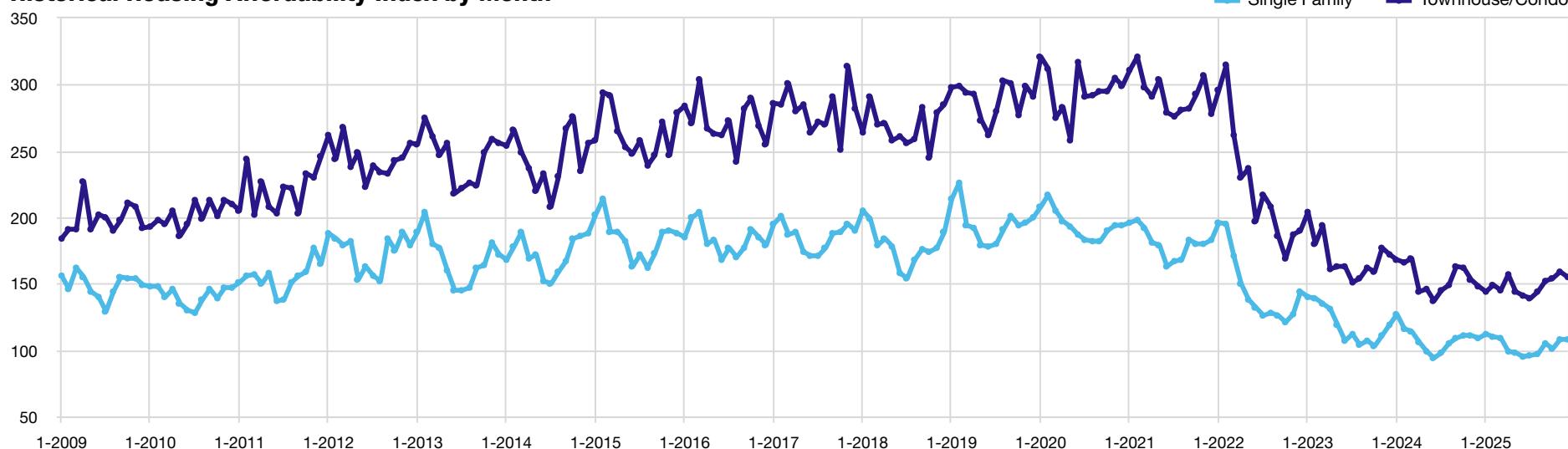


Year to Date



Affordability Index	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	112	-11.8%	144	-14.3%
Feb-2025	110	-5.2%	149	-10.2%
Mar-2025	109	-4.4%	145	-14.2%
Apr-2025	99	-6.6%	157	+9.0%
May-2025	98	-1.0%	144	-1.4%
Jun-2025	95	+1.1%	141	+2.9%
Jul-2025	96	-2.0%	139	-4.1%
Aug-2025	97	-7.6%	144	-3.4%
Sep-2025	105	-3.7%	152	-6.7%
Oct-2025	101	-9.0%	154	-4.9%
Nov-2025	108	-2.7%	159	+3.9%
Dec-2025	108	-0.9%	155	+4.7%
12-Month Avg	103	-4.6%	149	-3.2%

Historical Housing Affordability Index by Month

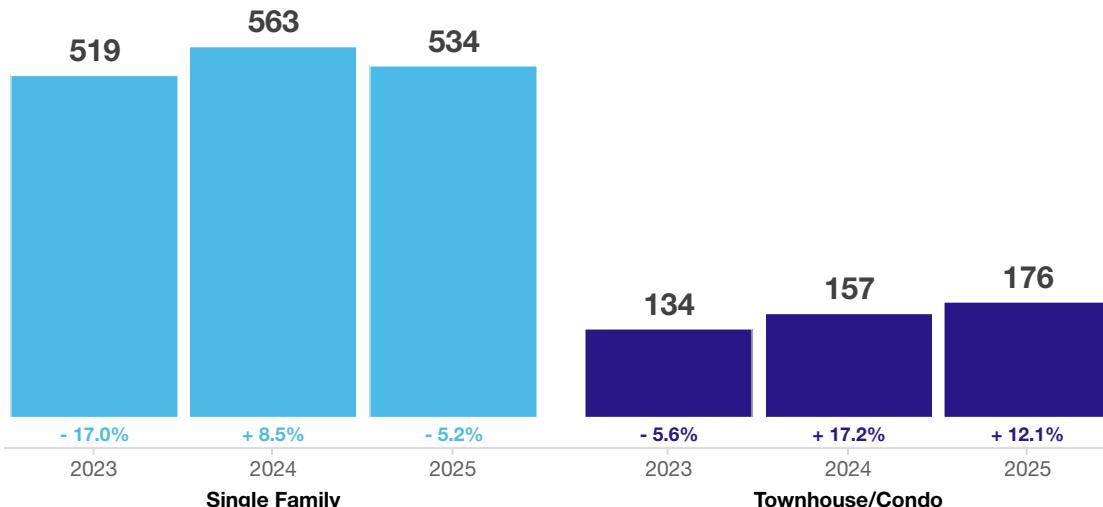


Inventory of Homes for Sale

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

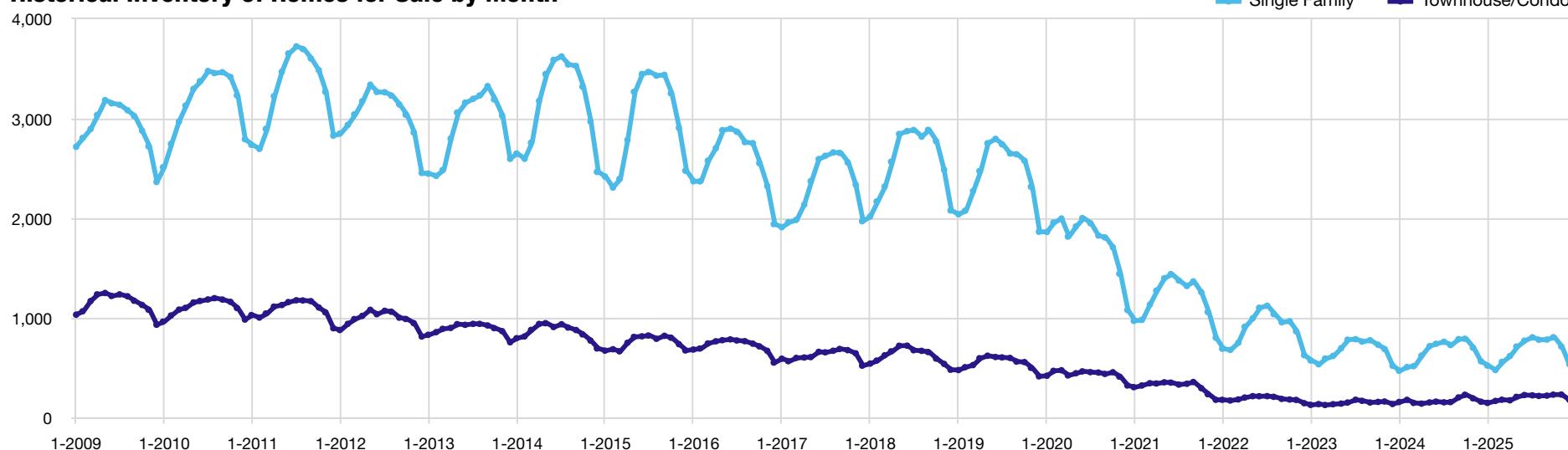


December



Homes for Sale	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	520	+ 11.1%	145	- 5.8%
Feb-2025	475	- 5.9%	165	- 6.3%
Mar-2025	557	+ 8.4%	177	+ 22.1%
Apr-2025	616	- 0.8%	171	+ 23.9%
May-2025	711	- 0.4%	206	+ 37.3%
Jun-2025	770	+ 4.2%	224	+ 41.8%
Jul-2025	804	+ 5.9%	221	+ 46.4%
Aug-2025	779	+ 7.3%	215	+ 40.5%
Sep-2025	781	- 0.5%	218	+ 9.0%
Oct-2025	805	+ 2.0%	228	+ 0.4%
Nov-2025	711	+ 1.6%	229	+ 19.9%
Dec-2025	534	- 5.2%	176	+ 12.1%
12-Month Avg	672	+ 2.3%	198	+ 18.6%

Historical Inventory of Homes for Sale by Month

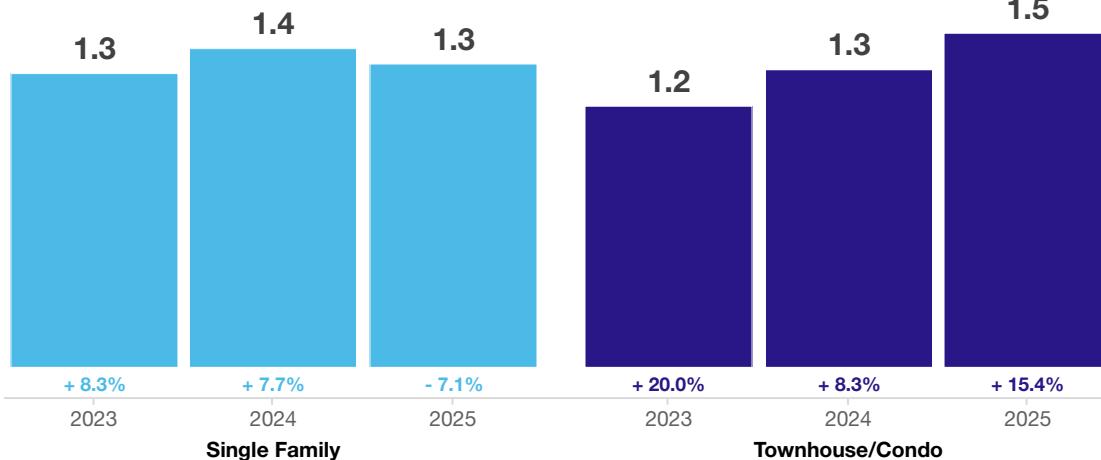


Months Supply of Inventory

The inventory of homes for sale at the end of a given month, divided by the average monthly pending sales from the last 12 months.



December

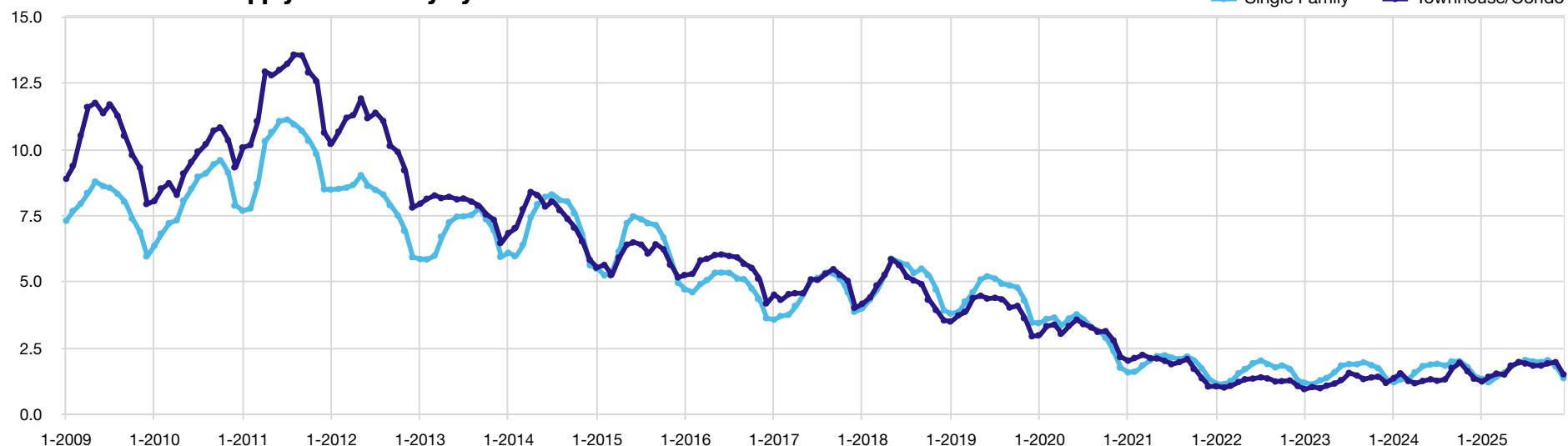


Months Supply	Single Family	Year-Over-Year Change	Townhouse / Condo	Year-Over-Year Change
Jan-2025	1.3	+ 8.3%	1.2	- 7.7%
Feb-2025	1.2	- 7.7%	1.4	- 6.7%
Mar-2025	1.4	+ 7.7%	1.5	+ 25.0%
Apr-2025	1.5	- 6.3%	1.5	+ 36.4%
May-2025	1.8	0.0%	1.8	+ 50.0%
Jun-2025	1.9	+ 5.6%	1.9	+ 46.2%
Jul-2025	2.0	+ 5.3%	1.9	+ 58.3%
Aug-2025	2.0	+ 11.1%	1.8	+ 38.5%
Sep-2025	1.9	- 5.0%	1.8	+ 5.9%
Oct-2025	2.0	0.0%	1.9	0.0%
Nov-2025	1.8	0.0%	1.9	+ 18.8%
Dec-2025	1.3	- 7.1%	1.5	+ 15.4%
12-Month Avg*	1.7	+ 2.1%	1.7	+ 19.8%

* Months Supply for all properties from January 2025 through December 2025. This is not the average of the individual figures above.

— Single Family — Townhouse/Condo

Historical Months Supply of Inventory by Month



All Residential Properties Market Overview

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



Key Metrics	Historical Sparkbars	12-2024		12-2025	% Change	YTD 2024	YTD 2025	% Change	
		12-2023	6-2024	12-2024	6-2025	12-2025	12-2023	6-2024	12-2024
New Listings		334		296	- 11.4%	7,269	7,286	+ 0.2%	
Pending Sales		409		407	- 0.5%	6,221	6,213	- 0.1%	
Closed Sales		536		523	- 2.4%	6,246	6,201	- 0.7%	
Days on Market Until Sale		24		22	- 8.3%	20	18	- 10.0%	
Median Sales Price		\$365,000		\$365,000	0.0%	\$367,000	\$385,000	+ 4.9%	
Average Sales Price		\$427,648		\$441,012	+ 3.1%	\$423,505	\$450,422	+ 6.4%	
Percent of List Price Received		103.0%		102.5%	- 0.5%	105.1%	104.5%	- 0.6%	
Housing Affordability Index		115		120	+ 4.3%	114	114	0.0%	
Inventory of Homes for Sale		720		710	- 1.4%	—	—	—	
Months Supply of Inventory		1.4		1.4	0.0%	—	—	—	