

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

August 2026

MIDDLETON
TAMPA BAY

Single-family and condominium market analysis for Hillsborough, Pinellas, Pasco, Manatee and Sarasota counties.

DATA RELEASED WEDNESDAY, SEPTEMBER 16, 2026

The month *in numbers.*

4,121
SINGLE-FAMILY SALES
down 5.0% year over year

$2.39B
SINGLE-FAMILY VOLUME
down 4.4% year over year

16,217
ACTIVE SF LISTINGS
down 10.8% year over year

1,463
CONDO AND TOWNHOME SALES
flat year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 4,121, down 5.0 percent from a year earlier, with $2.39 billion in dollar volume.
- Pinellas posted the strongest single-family median price change at +6.9%, while Sarasota posted the weakest at minus 1.1%.
- Single-family supply ranged from 3.5 months in Pinellas to 4.3 months in Pasco.
- Condominium and townhome closings totaled 1,463, unchanged from a year earlier, and condo supply ranged from 4.9 to 6.4 months.
- Active single-family inventory stood at 16,217 listings, down 10.8 percent from a year earlier.

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THE FIVE-COUNTY REGION

SEGMENT	CLOSED SALES	DOLLAR VOLUME	AVERAGE PRICE	NEW LISTINGS	NEW PENDING	ACTIVE LISTINGS	CASH SHARE
Single-Family	4,121 −5.0%	$2.39 B −4.4%	$579,956 +0.6%	5,079 −0.9%	4,114 −4.5%	16,217 −10.8%	27%
Condo and Townhome	1,463 0.0%	$549.6 M −2.3%	$375,666 −2.3%	1,987 −0.5%	1,475 0.0%	9,253 −6.8%	52%

Regional totals sum the five counties. The regional average price equals total dollar volume divided by total closed sales. County medians cannot be combined into a regional median, so medians are reported county by county.



ANALYST'S NOTE

Reading August *with care.*

Monthly numbers move. A single month can be shaped by a few large closings, a holiday or a storm, so I read each report against the same month a year earlier and against the trend of the past thirteen months.

In August, regional single-family sales were down 5.0 percent from a year earlier and the regional average price was up 0.6 percent from a year earlier. Active inventory was down 10.8 percent on the year.

WHAT STOOD OUT

Pinellas led the region in single-family price growth at +6.9% year over year. Pinellas had the tightest supply at 3.5 months. Homes moved fastest in Hillsborough, at a median 35 days to contract, and slowest in Sarasota, at 47 days.

Negotiating room varied as well. Sellers received a median 96.8% of original list price in Hillsborough and 94.7% in Sarasota.

WHAT IT MEANS

For sellers, pricing to the most recent comparable sales matters more than ever. The gap between original list price and sale price tells you how much the market is willing to negotiate in your county.

For buyers, condominium supply above six months in Pinellas and Pasco points to real negotiating leverage in that segment.

Data tells you where the market is. Strategy decides what you do about it.

MARK ALLEN MIDDLETON · REALTOR® · COMPASS

Single-Family Homes, *county by county.*

Each figure shows the August 2026 value with its change from August 2025 beneath it. Days to contract is the median number of days from listing to accepted contract.

COUNTY	CLOSED SALES	MEDIAN PRICE	AVERAGE PRICE	DAYS TO CONTRACT	% OF ORIGINAL LIST	ACTIVE LISTINGS	MONTHS SUPPLY	CASH SHARE
Hillsborough	1,134 −14.0%	$419,900 −0.8%	$553,452 −1.9%	35 −10.3%	96.8% +0.9%	4,625 −6.4%	3.9 −4.9%	21%
Pinellas	854 −8.3%	$464,950 +6.9%	$624,374 +7.1%	37 −22.9%	95.3% +2.1%	3,050 −18.5%	3.5 −20.5%	31%
Pasco	800 +0.4%	$383,745 −0.1%	$424,964 −1.6%	43 +2.4%	96.5% +0.6%	3,307 −2.2%	4.3 +4.9%	21%
Manatee	687 +5.7%	$495,000 +5.9%	$663,878 −0.3%	45 −15.1%	95.6% +0.8%	2,616 −7.0%	3.9 −15.2%	27%
Sarasota	646 +0.8%	$470,000 −1.1%	$670,413 −1.9%	47 −31.9%	94.7% +2.6%	2,619 −20.8%	3.7 −28.8%	37%
Region	4,121 −5.0%	By county	$579,956 +0.6%	By county	By county	16,217 −10.8%	By county	27%

5,079
NEW LISTINGS
down 0.9% year over year, five counties

4,114
NEW PENDING SALES
down 4.5% year over year, five counties

34,521
CLOSED SALES YEAR TO DATE
January through August, five counties

YEAR TO DATE, JANUARY THROUGH AUGUST

9,825
HILLSBOROUGH
down 3.2% in closed sales

6,961
PINELLAS
down 4.0% in closed sales

6,268
PASCO
down 10.9% in closed sales

5,565
MANATEE
up 9.1% in closed sales

5,902
SARASOTA
up 5.5% in closed sales

Months supply divides active inventory by the twelve-month average of monthly closed sales, as published by Florida Realtors®, whose economists cite 5.5 months as the benchmark for a balanced market. We describe readings under 5 months as seller-leaning, 5 to 6 months as near balance and above 6 months as buyer-leaning.

Condominiums and Townhomes, *county by county.*

Each figure shows the August 2026 value with its change from August 2025 beneath it. Days to contract is the median number of days from listing to accepted contract.

COUNTY	CLOSED SALES	MEDIAN PRICE	AVERAGE PRICE	DAYS TO CONTRACT	% OF ORIGINAL LIST	ACTIVE LISTINGS	MONTHS SUPPLY	CASH SHARE
Hillsborough	301 −9.6%	$279,000 +2.2%	$411,465 +21.4%	48 −14.3%	94.4% +1.1%	1,892 −1.2%	6.0 +3.4%	44%
Pinellas	463 −6.5%	$275,000 +5.8%	$359,926 −21.9%	74 +8.8%	91.7% +0.5%	3,529 −5.7%	6.4 −20.0%	59%
Pasco	177 −5.9%	$269,990 +7.9%	$255,097 +4.1%	71 +51.1%	94.8% +1.3%	1,002 +1.3%	6.4 +30.6%	35%
Manatee	241 +20.5%	$307,000 +5.4%	$372,591 +5.0%	72 −7.7%	93.4% +3.3%	1,171 −16.1%	4.9 −23.4%	51%
Sarasota	281 +13.8%	$310,000 +3.3%	$441,558 +4.7%	83 −4.6%	91.6% +3.5%	1,659 −11.8%	5.2 −25.7%	60%
Region	1,463 0.0%	By county	$375,666 −2.3%	By county	By county	9,253 −6.8%	By county	52%

1,987
NEW LISTINGS
down 0.5% year over year, five counties

1,475
NEW PENDING SALES
flat year over year, five counties

13,440
CLOSED SALES YEAR TO DATE
January through August, five counties

YEAR TO DATE, JANUARY THROUGH AUGUST

2,599
HILLSBOROUGH
down 5.9% in closed sales

4,714
PINELLAS
up 19.6% in closed sales

1,265
PASCO
down 22.4% in closed sales

2,042
MANATEE
up 7.8% in closed sales

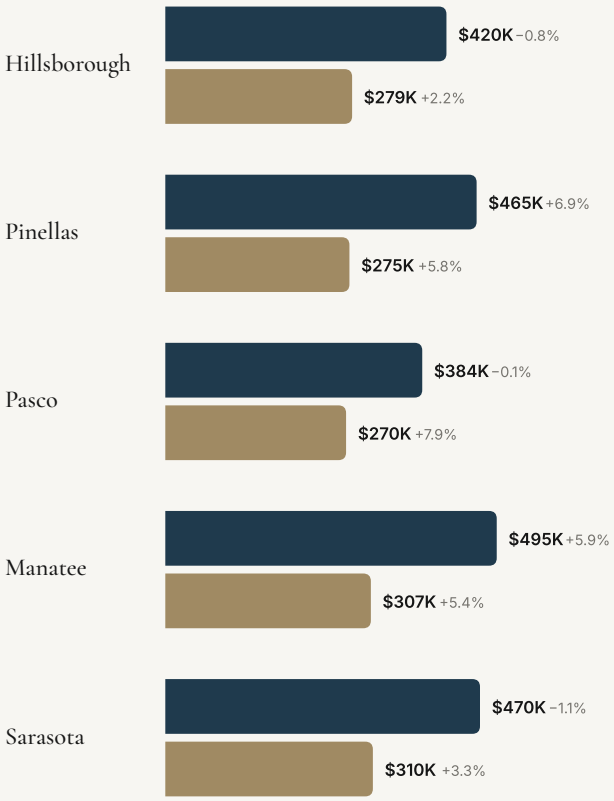
2,820
SARASOTA
up 22.8% in closed sales

Months supply divides active inventory by the twelve-month average of monthly closed sales, as published by Florida Realtors®, whose economists cite 5.5 months as the benchmark for a balanced market. We describe readings under 5 months as seller-leaning, 5 to 6 months as near balance and above 6 months as buyer-leaning.

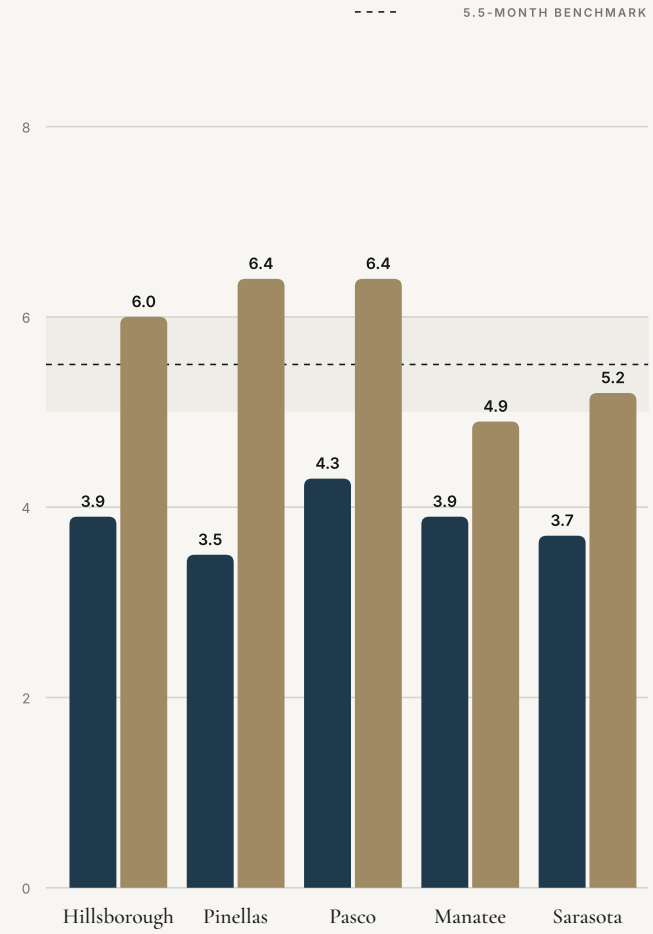
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, AUGUST 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, AUGUST 2026



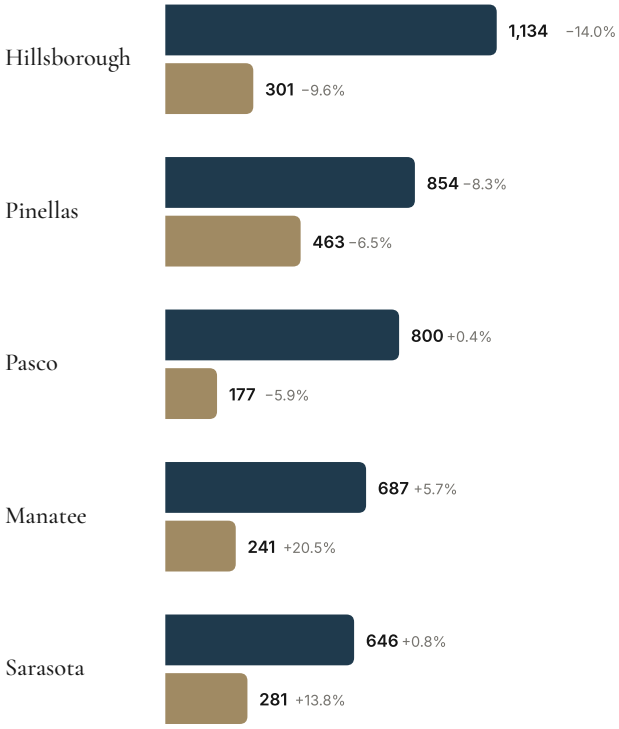
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

Months supply measures how long current inventory would last at the average pace of sales over the past twelve months. Florida Realtors® economists treat 5.5 months as the benchmark for a balanced market. Single-family supply this month ranged from 3.5 to 4.3 months. Condominium supply ranged from 4.9 to 6.4 months.

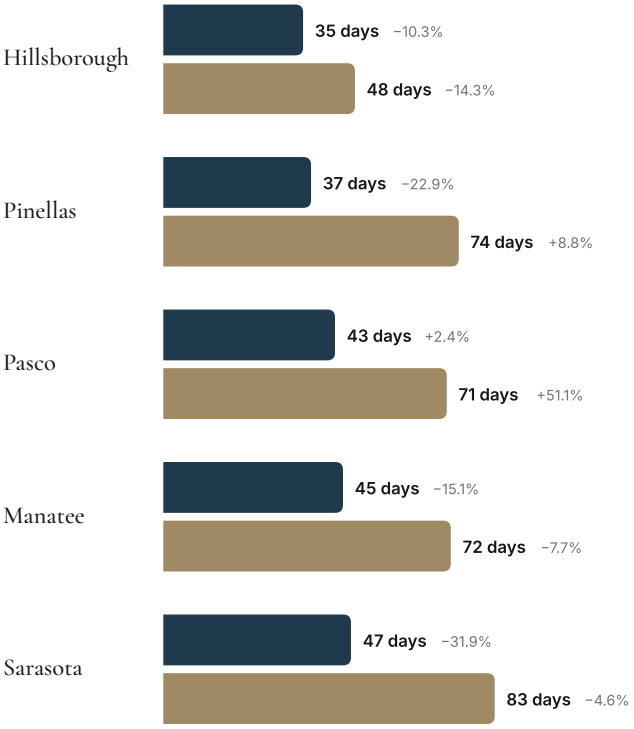
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, AUGUST 2026, CHANGE YEAR OVER YEAR



MEDIAN DAYS TO CONTRACT, CHANGE YEAR OVER YEAR



Closed sales confirm what buyers actually did. Because sales follow strong seasonal patterns in Florida, we compare each month with the same month a year earlier rather than with the prior month.

Days to contract is our preferred measure of urgency. In August, single-family homes went under contract fastest in Hillsborough at 35 days and slowest in Sarasota at 47 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

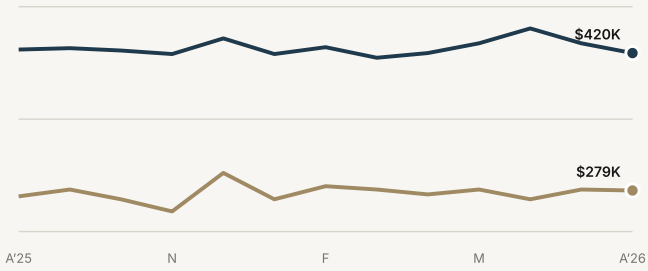
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

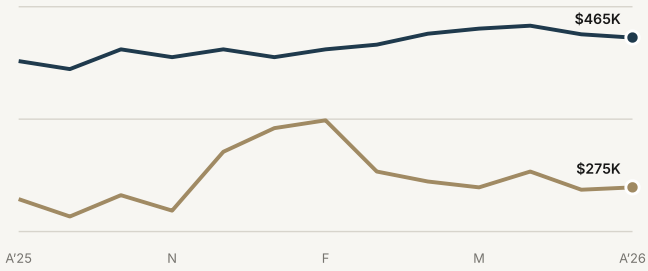
Median sale price for each county from August 2025 through August 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

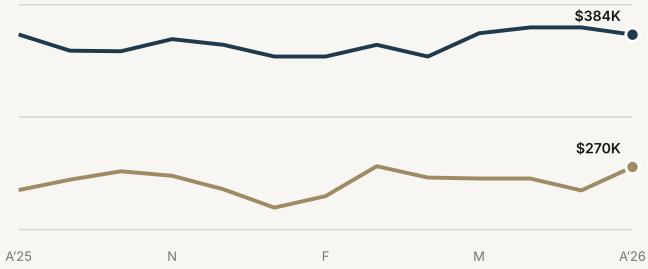
Hillsborough



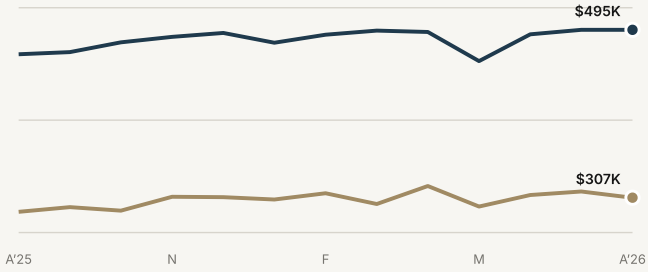
Pinellas



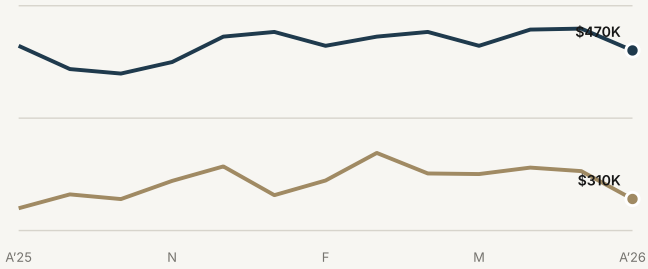
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is August 2026. Scales differ by county so that each county's own trend is visible. Compare shapes, not heights.



DOWNTOWN TAMPA AND THE HILLSBOROUGH RIVER

COUNTY REPORT · AUGUST 2026

Hillsborough *County*

TAMPA, BRANDON, RIVERVIEW, PLANT CITY AND THE NORTHERN SUBURBS

SINGLE-FAMILY HOMES

Closed sales	1,134	−14.0%
Median sale price	$419,900	−0.8%
Average sale price	$553,452	−1.9%
Dollar volume	$627.6 M	−15.6%
Median days to contract	35	−10.3%
Median days to sale	74	−5.1%
% of original list received	96.8%	+0.9%
New listings	1,532	+4.0%
New pending sales	1,202	−3.6%
Active listings	4,625	−6.4%
Months supply	3.9	−4.9%
Cash share of sales	21%	

CONDOS AND TOWNHOMES

Closed sales	301	−9.6%
Median sale price	$279,000	+2.2%
Average sale price	$411,465	+21.4%
Dollar volume	$123.9 M	+9.7%
Median days to contract	48	−14.3%
Median days to sale	92	+3.4%
% of original list received	94.4%	+1.1%
New listings	475	−2.9%
New pending sales	295	−11.4%
Active listings	1,892	−1.2%
Months supply	6.0	+3.4%
Cash share of sales	44%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,134 in August, down 14.0 percent from a year earlier. The median sale price settled at $419,900, down 0.8 percent from a year earlier, and sellers received a median 96.8% of original list price. Homes went under contract in a median 35 days. With 4,625 active listings, the county held 3.9 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 301 closings, down 9.6 percent from a year earlier, at a median of $279,000. Supply stood at 6.0 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

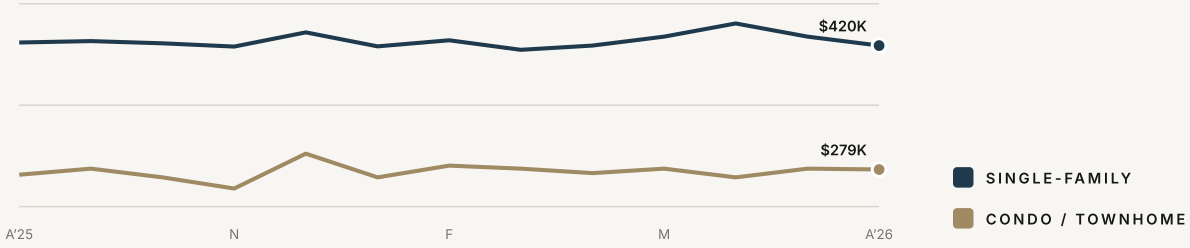
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	31	+29.2%	35	34	1.1
$200,000 to $299,999	111	−17.2%	33	390	3.5
$300,000 to $399,999	370	−12.5%	35	1,328	3.6
$400,000 to $499,999	229	−8.8%	37	1,000	4.4
$500,000 to $599,999	124	−27.5%	35	604	4.9
$600,000 to $699,999	80	−5.9%	33	282	3.5
$700,000 to $799,999	39	−32.8%	34	193	4.9
$800,000 to $899,999	41	+5.1%	22	139	3.4
$900,000 to $999,999	14	−48.1%	18	95	6.8
$1,000,000 or more	95	−10.4%	38	560	5.9

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	77	+8.5%	58	521	6.8
$200,000 to $299,999	93	−27.3%	54	579	6.2
$300,000 to $399,999	58	+1.8%	40	293	5.1
$400,000 to $499,999	27	−12.9%	64	122	4.5
$500,000 to $599,999	13	−23.5%	29	75	5.8
$600,000 to $699,999	8	+14.3%	49	58	7.2
$700,000 to $799,999	6	−14.3%	49	41	6.8
$800,000 to $899,999	3	−50.0%	37	33	11.0
$900,000 to $999,999	2	−33.3%	75	19	9.5
$1,000,000 or more	14	+133.3%	29	151	10.8

Hillsborough median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



DOWNTOWN ST. PETERSBURG AND THE ST. PETE PIER

COUNTY REPORT · AUGUST 2026

Pinellas *County*

ST. PETERSBURG, CLEARWATER, DUNEDIN, LARGO AND THE GULF BEACHES

SINGLE-FAMILY HOMES

Closed sales	854	−8.3%
Median sale price	$464,950	+6.9%
Average sale price	$624,374	+7.1%
Dollar volume	$533.2 M	−1.8%
Median days to contract	37	−22.9%
Median days to sale	73	−13.1%
% of original list received	95.3%	+2.1%
New listings	1,010	−6.7%
New pending sales	805	−13.9%
Active listings	3,050	−18.5%
Months supply	3.5	−20.5%
Cash share of sales	31%	

CONDOS AND TOWNHOMES

Closed sales	463	−6.5%
Median sale price	$275,000	+5.8%
Average sale price	$359,926	−21.9%
Dollar volume	$166.6 M	−27.0%
Median days to contract	74	+8.8%
Median days to sale	109	+4.8%
% of original list received	91.7%	+0.5%
New listings	687	+1.0%
New pending sales	491	+1.2%
Active listings	3,529	−5.7%
Months supply	6.4	−20.0%
Cash share of sales	59%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 854 in August, down 8.3 percent from a year earlier. The median sale price settled at $464,950, up 6.9 percent from a year earlier, and sellers received a median 95.3% of original list price. Homes went under contract in a median 37 days. With 3,050 active listings, the county held 3.5 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 463 closings, down 6.5 percent from a year earlier, at a median of $275,000. Supply stood at 6.4 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

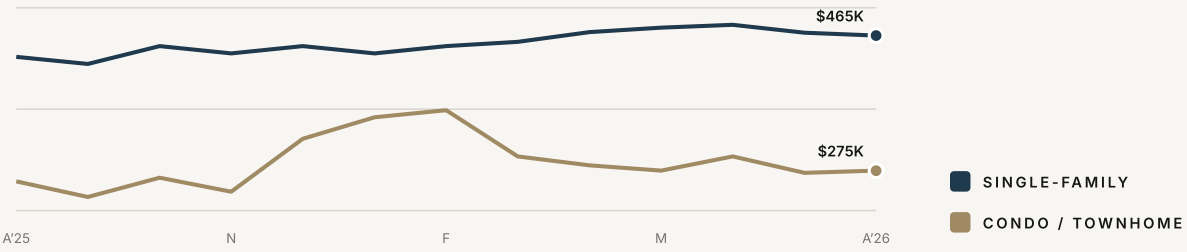
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	17	−43.3%	35	27	1.6
$200,000 to $299,999	100	−24.2%	41	223	2.2
$300,000 to $399,999	181	−20.3%	33	565	3.1
$400,000 to $499,999	175	−2.8%	29	548	3.1
$500,000 to $599,999	99	+2.1%	27	367	3.7
$600,000 to $699,999	69	−2.8%	44	249	3.6
$700,000 to $799,999	47	0.0%	43	158	3.4
$800,000 to $899,999	40	+5.3%	42	126	3.1
$900,000 to $999,999	27	+22.7%	61	95	3.5
$1,000,000 or more	99	+13.8%	71	692	7.0

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	172	+1.2%	81	1,138	6.6
$200,000 to $299,999	81	−25.0%	66	752	9.3
$300,000 to $399,999	69	+4.5%	70	416	6.0
$400,000 to $499,999	43	+26.5%	46	278	6.5
$500,000 to $599,999	32	+23.1%	68	173	5.4
$600,000 to $699,999	19	0.0%	59	158	8.3
$700,000 to $799,999	10	+11.1%	113	125	12.5
$800,000 to $899,999	9	+28.6%	142	79	8.8
$900,000 to $999,999	8	0.0%	90	72	9.0
$1,000,000 or more	20	−58.3%	93	338	16.9

Pinellas median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



GULF HARBORS, NEW PORT RICHEY

COUNTY REPORT · AUGUST 2026

Pasco *County*

NEW PORT RICHEY, WESLEY CHAPEL, LAND O' LAKES AND ZEPHYRHILLS

SINGLE-FAMILY HOMES		
Closed sales	800	+0.4%
Median sale price	$383,745	−0.1%
Average sale price	$424,964	−1.6%
Dollar volume	$340.0 M	−1.3%
Median days to contract	43	+2.4%
Median days to sale	86	+7.5%
% of original list received	96.5%	+0.6%
New listings	1,040	−2.7%
New pending sales	777	−6.6%
Active listings	3,307	−2.2%
Months supply	4.3	+4.9%
Cash share of sales	21%	

CONDOS AND TOWNHOMES		
Closed sales	177	−5.9%
Median sale price	$269,990	+7.9%
Average sale price	$255,097	+4.1%
Dollar volume	$45.2 M	−2.0%
Median days to contract	71	+51.1%
Median days to sale	115	+33.7%
% of original list received	94.8%	+1.3%
New listings	226	−8.5%
New pending sales	161	−12.0%
Active listings	1,002	+1.3%
Months supply	6.4	+30.6%
Cash share of sales	35%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 800 in August, up 0.4 percent from a year earlier. The median sale price settled at $383,745, down 0.1 percent from a year earlier, and sellers received a median 96.5% of original list price. Homes went under contract in a median 43 days. With 3,307 active listings, the county held 4.3 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 177 closings, down 5.9 percent from a year earlier, at a median of $269,990. Supply stood at 6.4 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

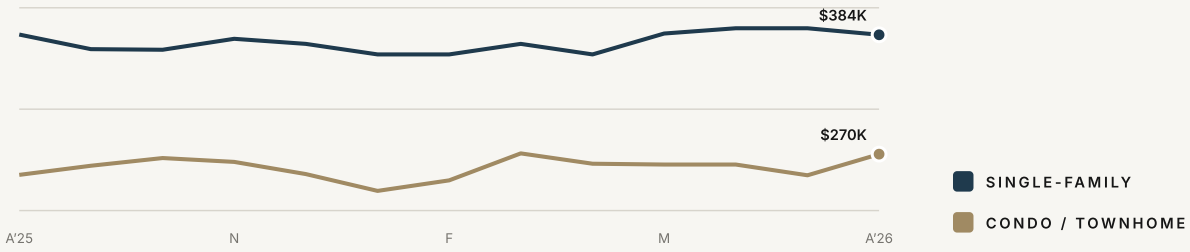
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	51	+2.0%	20	112	2.2
$200,000 to $299,999	162	+7.3%	47	705	4.4
$300,000 to $399,999	221	−9.4%	46	940	4.3
$400,000 to $499,999	139	−0.7%	43	598	4.3
$500,000 to $599,999	105	+20.7%	45	355	3.4
$600,000 to $699,999	62	+44.2%	43	186	3.0
$700,000 to $799,999	24	−20.0%	82	134	5.6
$800,000 to $899,999	14	−46.2%	39	85	6.1
$900,000 to $999,999	5	−37.5%	41	61	12.2
$1,000,000 or more	17	−5.6%	83	131	7.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	46	−25.8%	97	380	8.3
$200,000 to $299,999	73	+9.0%	71	363	5.0
$300,000 to $399,999	52	+8.3%	43	199	3.8
$400,000 to $499,999	3	−72.7%	66	40	13.3
$500,000 to $599,999	1	N/A	0	6	6.0
$600,000 to $699,999	1	N/A	116	6	6.0
$700,000 to $799,999	0	N/A	·	5	·
$800,000 to $899,999	0	N/A	·	0	·
$900,000 to $999,999	1	N/A	0	0	0.0
$1,000,000 or more	0	N/A	·	3	·

Pasco median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.

COUNTY REPORT

Manatee

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

COUNTY REPORT · AUGUST 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES

Closed sales	687	+5.7%
Median sale price	$495,000	+5.9%
Average sale price	$663,878	−0.3%
Dollar volume	$456.1 M	+5.4%
Median days to contract	45	−15.1%
Median days to sale	95	−5.9%
% of original list received	95.6%	+0.8%
New listings	735	−3.7%
New pending sales	665	+4.4%
Active listings	2,616	−7.0%
Months supply	3.9	−15.2%
Cash share of sales	27%	

CONDOS AND TOWNHOMES

Closed sales	241	+20.5%
Median sale price	$307,000	+5.4%
Average sale price	$372,591	+5.0%
Dollar volume	$89.8 M	+26.5%
Median days to contract	72	−7.7%
Median days to sale	116	−3.3%
% of original list received	93.4%	+3.3%
New listings	258	+4.9%
New pending sales	230	+8.0%
Active listings	1,171	−16.1%
Months supply	4.9	−23.4%
Cash share of sales	51%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 687 in August, up 5.7 percent from a year earlier. The median sale price settled at $495,000, up 5.9 percent from a year earlier, and sellers received a median 95.6% of original list price. Homes went under contract in a median 45 days. With 2,616 active listings, the county held 3.9 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 241 closings, up 20.5 percent from a year earlier, at a median of $307,000. Supply stood at 4.9 months, seller-leaning by the same measure.

ACTIVITY BY PRICE RANGE

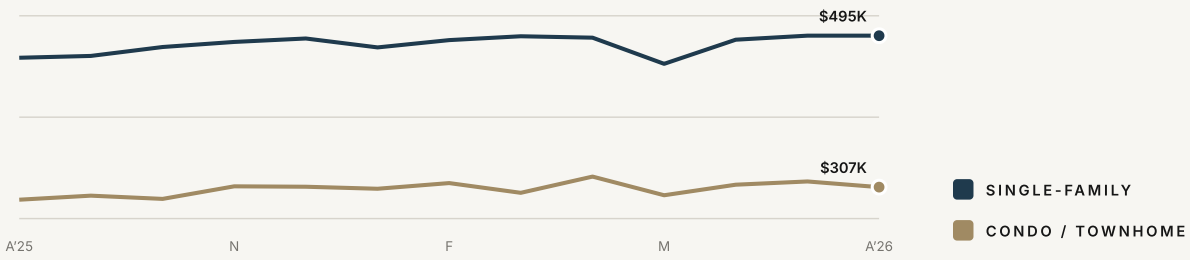
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	5	−50.0%	14	17	3.4
$200,000 to $299,999	39	+11.4%	47	83	2.1
$300,000 to $399,999	161	−13.9%	45	543	3.4
$400,000 to $499,999	141	+11.0%	50	552	3.9
$500,000 to $599,999	95	+21.8%	61	325	3.4
$600,000 to $699,999	62	+6.9%	29	222	3.6
$700,000 to $799,999	54	+35.0%	41	171	3.2
$800,000 to $899,999	33	+50.0%	42	124	3.8
$900,000 to $999,999	26	+52.9%	21	80	3.1
$1,000,000 or more	71	−6.6%	59	499	7.0

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	43	+30.3%	93	315	7.3
$200,000 to $299,999	73	+1.4%	66	286	3.9
$300,000 to $399,999	73	+12.3%	76	259	3.5
$400,000 to $499,999	19	+26.7%	57	127	6.7
$500,000 to $599,999	13	+160.0%	32	68	5.2
$600,000 to $699,999	7	+133.3%	18	35	5.0
$700,000 to $799,999	4	+300.0%	115	23	5.8
$800,000 to $899,999	2	+100.0%	58	12	6.0
$900,000 to $999,999	2	+100.0%	51	11	5.5
$1,000,000 or more	5	+25.0%	120	35	7.0

Manatee median sale price, thirteen months



Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.



A RESIDENCE IN SARASOTA

COUNTY REPORT · AUGUST 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	646	+0.8%
Median sale price	$470,000	−1.1%
Average sale price	$670,413	−1.9%
Dollar volume	$433.1 M	−1.2%
Median days to contract	47	−31.9%
Median days to sale	91	−16.5%
% of original list received	94.7%	+2.6%
New listings	762	+3.5%
New pending sales	665	+1.1%
Active listings	2,619	−20.8%
Months supply	3.7	−28.8%
Cash share of sales	37%	

CONDOS AND TOWNHOMES		
Closed sales	281	+13.8%
Median sale price	$310,000	+3.3%
Average sale price	$441,558	+4.7%
Dollar volume	$124.1 M	+19.1%
Median days to contract	83	−4.6%
Median days to sale	124	−6.1%
% of original list received	91.6%	+3.5%
New listings	341	+1.8%
New pending sales	298	+14.2%
Active listings	1,659	−11.8%
Months supply	5.2	−25.7%
Cash share of sales	60%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 646 in August, up 0.8 percent from a year earlier. The median sale price settled at $470,000, down 1.1 percent from a year earlier, and sellers received a median 94.7% of original list price. Homes went under contract in a median 47 days. With 2,619 active listings, the county held 3.7 months of supply, a reading we describe as seller-leaning against the 5.5-month balanced benchmark.

Condominiums and townhomes. The condominium and townhome segment recorded 281 closings, up 13.8 percent from a year earlier, at a median of $310,000. Supply stood at 5.2 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

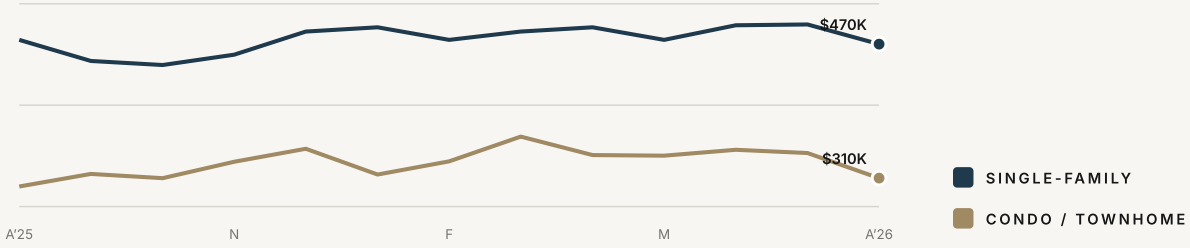
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	23	+27.8%	41	35	1.5
$200,000 to $299,999	73	+10.6%	55	223	3.1
$300,000 to $399,999	148	−11.4%	42	577	3.9
$400,000 to $499,999	105	+9.4%	36	432	4.1
$500,000 to $599,999	63	−7.4%	45	275	4.4
$600,000 to $699,999	57	0.0%	40	178	3.1
$700,000 to $799,999	47	+38.2%	42	146	3.1
$800,000 to $899,999	37	+54.2%	68	88	2.4
$900,000 to $999,999	15	−42.3%	43	78	5.2
$1,000,000 or more	78	−8.2%	80	587	7.5

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	54	+5.9%	96	235	4.4
$200,000 to $299,999	76	+5.6%	63	419	5.5
$300,000 to $399,999	62	+12.7%	97	285	4.6
$400,000 to $499,999	30	0.0%	73	149	5.0
$500,000 to $599,999	13	+85.7%	188	107	8.2
$600,000 to $699,999	10	+66.7%	288	77	7.7
$700,000 to $799,999	6	+50.0%	71	45	7.5
$800,000 to $899,999	5	+150.0%	45	35	7.0
$900,000 to $999,999	4	+300.0%	26	39	9.8
$1,000,000 or more	21	+10.5%	69	268	12.8

Sarasota median sale price, thirteen months

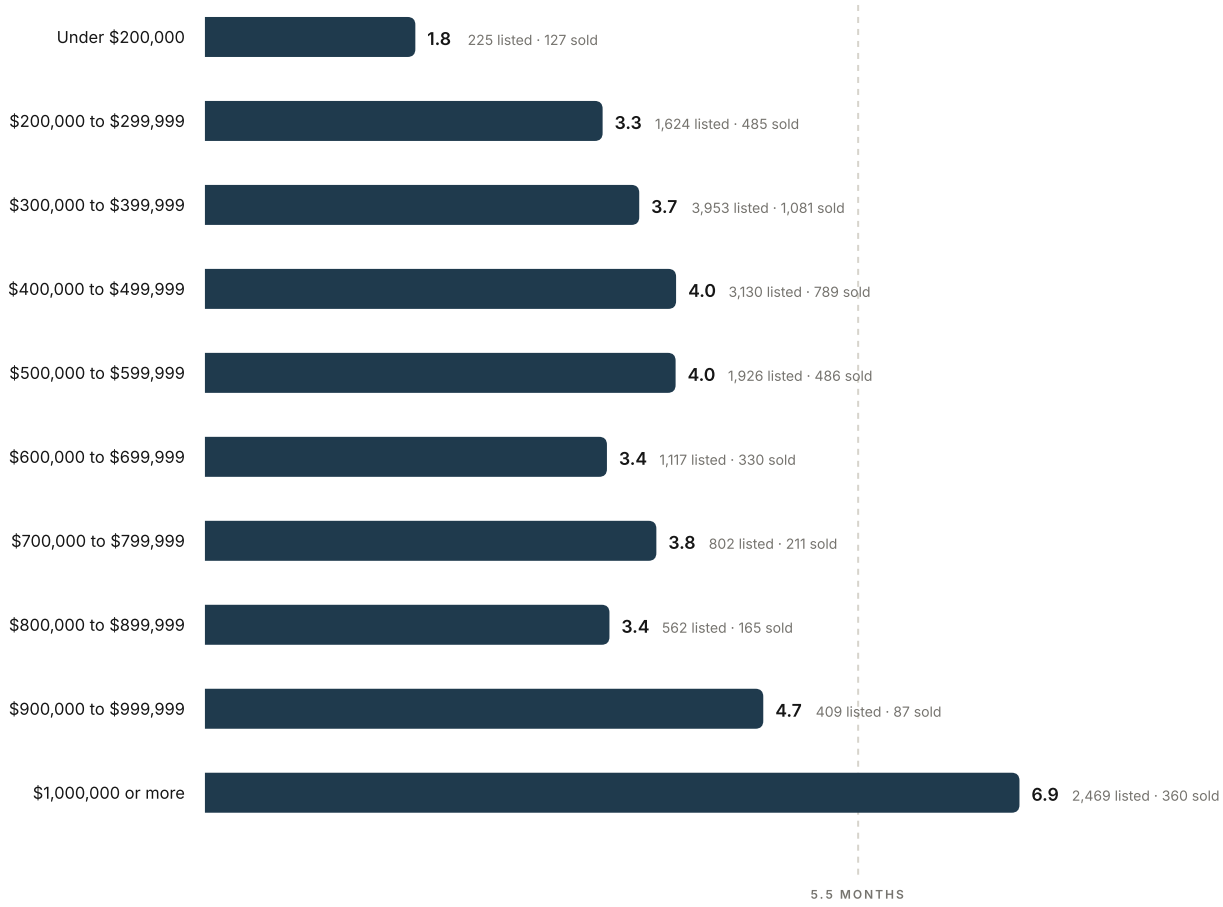


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot indicates no sales.

Not one market, *but many price points.*

Combining all five counties, we compared active single-family listings in each price range with the number of homes that sold in that range during August. The result shows where inventory is scarce and where buyers have more choice.

LISTINGS-TO-SALES RATIO BY PRICE RANGE, AUGUST 2026



UNDER $500,000

Listings in these ranges equaled 3.6 months of August's sales. Entry and mid-priced homes continue to carry the most transactions in the region.

$700,000 AND ABOVE

Listings equaled 5.2 months of August's sales. Higher price points typically carry deeper inventory, which places more weight on presentation and pricing precision.

Sales are grouped by sale price and listings by current list price, so the ratio is an approximation. Single-month ratios can swing with seasonal sales volume.



THE LUXURY MARKET · $1,000,000 AND ABOVE

The million-dollar *spotlight.*

Across the five counties, 360 single-family homes sold for $1 million or more in August, against 2,469 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	133	134	526
$1.25M to $1.5M	72	127	491
$1.5M to $2M	71	107	482
$2M to $3M	44	77	408
$3M to $5M	29	46	340
$5M to $10M	10	25	164
$10M and above	1	4	58

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	95	−10.4%	560	−14.2%
Pinellas	99	+13.8%	692	−8.8%
Pasco	17	−5.6%	131	−14.9%
Manatee	71	−6.6%	499	−8.9%
Sarasota	78	−8.2%	587	−13.3%

Beneath the headline *numbers.*

	SINGLE-FAMILY			CONDOS AND TOWNHOMES		
COUNTY	CASH SHARE	DISTRESSED SALES	PENDING TO NEW	CASH SHARE	DISTRESSED SALES	PENDING TO NEW
Hillsborough	21%	25	0.78	44%	2	0.62
Pinellas	31%	12	0.80	59%	0	0.71
Pasco	21%	10	0.75	35%	0	0.71
Manatee	27%	6	0.90	51%	1	0.89
Sarasota	37%	10	0.87	60%	4	0.87

CASH SHARE
The share of closings paid entirely in cash. Higher readings often point to investors, second-home buyers and downsizers with equity. Regionally, 27 percent of single-family and 52 percent of condominium sales closed in cash.

DISTRESSED SALES
Foreclosure, bank-owned and short sales combined. Counts that remain small relative to total sales indicate a market driven by traditional sellers rather than forced sales.

PENDING TO NEW
New pending sales divided by new listings. Above 1.0, buyers are absorbing listings faster than they arrive. Below 1.0, inventory is building. It is one of the earliest signals of a turn in either direction.

METHODOLOGY AND DEFINITIONS

How this report *is built.*

All figures come from the Florida Realtors® Monthly Market Detail reports for Hillsborough, Pinellas, Pasco, Manatee and Sarasota counties, produced with data provided by Florida's multiple listing services. Statistics for each month are compiled from MLS feeds on the tenth day of the following month. The August 2026 data was released on Wednesday, September 16, 2026.

Regional totals are sums of county figures. Regional average prices are total dollar volume divided by total closed sales. Ratios such as cash share, listings to sales and pending to new are calculated by Middleton Tampa Bay from the published figures.

Historical figures can be revised by Florida Realtors® as MLS data is updated. Every figure in this report reflects the data as published for August 2026.

Closed sales. Transactions that closed during the month.

Median sale price. The midpoint price of all closed sales. Half sold for more and half for less.

Average sale price. Dollar volume divided by closed sales. Sensitive to high-priced sales.

Median days to contract. Days from listing to accepted contract for homes that closed.

Percent of original list price. Sale price as a share of the original list price, at the median.

New pending sales. Listings that went under contract during the month.

Active listings. Listings active on the last day of the month.

Months supply. Active inventory divided by the twelve-month average of monthly closed sales. Florida Realtors® economists treat 5.5 months as balanced.

Cash sales. Closings paid entirely in cash.

This report is provided for informational purposes and is not an appraisal, financial or investment advice. Market conditions vary by neighborhood and property. For a pricing opinion on a specific home, contact Middleton Tampa Bay.



MARKET INTELLIGENCE, APPLIED

What does August mean *for your home?*

County numbers set the stage. Your street, your property and your timing decide the outcome. I will prepare a private valuation and strategy built on the latest sales in your neighborhood, at no cost and with no obligation.

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TAMPA BAY MARKET INTELLIGENCE

August 2026

MIDDLETON
TAMPA BAY

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COMPASS

Source: Florida Realtors® Monthly Market Detail, August 2026, with data provided by Florida's multiple listing services. Analysis and commentary by Middleton Tampa Bay. Compass is a licensed real estate broker and abides by Equal Housing Opportunity laws. All material is intended for informational purposes only and is compiled from sources deemed reliable but is subject to errors, omissions and changes without notice. 3615 Bromley Grand Avenue, Suite 230, Tampa, Florida 33607.