

TAMPA BAY MARKET INTELLIGENCE · MONTHLY REPORT

March 2026

MIDDLETON
TAMPA BAY

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

DATA RELEASED FRIDAY, APRIL 17, 2026

The month *in numbers.*

4,922
SINGLE-FAMILY SALES
up 3.3% year over year

$2.86B
SINGLE-FAMILY VOLUME
up 4.8% year over year

16,980
ACTIVE SF LISTINGS
down 11.1% year over year

2,063
CONDO AND TOWNHOME SALES
up 18.0% year over year

KEY TAKEAWAYS

- Single-family closings across the five counties totaled 4,922, up 3.3 percent from a year earlier, with $2.86 billion in dollar volume.
- Pinellas posted the strongest single-family median price change at +4.8%, while Pasco posted the weakest at minus 4.6%.
- Single-family supply ranged from 3.6 months in Hillsborough to 4.8 months in Sarasota.
- Condominium and townhome closings totaled 2,063, up 18.0 percent from a year earlier, and condo supply ranged from 5.6 to 8.1 months.
- Active single-family inventory stood at 16,980 listings, down 11.1 percent from a year earlier.

IN THIS REPORT

Analyst's Note	03
Single-Family Scorecard	04
Condominium Scorecard	05
Price and Supply	06
Pace of the Market	07
Thirteen-Month Price Trends	08
County Reports	09
Price Tiers	19
The Luxury Market	20
Cash, Distress and Momentum	21
Methodology and Definitions	22

THE FIVE-COUNTY REGION

SEGMENT	CLOSED SALES	DOLLAR VOLUME	AVERAGE PRICE	NEW LISTINGS	NEW PENDING	ACTIVE LISTINGS	CASH SHARE
Single-Family	4,922 +3.3%	$2.86 B +4.8%	$581,065 +1.5%	6,011 −16.2%	5,260 +0.4%	16,980 −11.1%	27%
Condo and Townhome	2,063 +18.0%	$1.02 B +47.1%	$494,086 +24.6%	2,741 −13.0%	2,190 +10.6%	10,974 −5.7%	54%

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 March *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 March, regional single-family sales were up 3.3 percent from a year earlier and the regional average price was up 1.5 percent from a year earlier. Active inventory was down 11.1 percent on the year.

WHAT STOOD OUT

Pinellas led the region in single-family price growth at +4.8% year over year. Hillsborough had the tightest supply at 3.6 months. Homes moved fastest in Pinellas, at a median 37 days to contract, and slowest in Manatee, at 51 days.

Negotiating room varied as well. Sellers received a median 96.9% of original list price in Hillsborough and 93.8% 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, Manatee and Sarasota 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 March 2026 value with its change from March 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	1,348 −2.1%	$415,000 0.0%	$531,511 +0.7%	39 +11.4%	96.9% −0.2%	4,396 −3.7%	3.6 0.0%	17%
Pinellas	974 −2.5%	$456,000 +4.8%	$601,424 +4.0%	37 +15.6%	94.7% 0.0%	3,262 −13.6%	3.8 −15.6%	32%
Pasco	896 −1.0%	$375,000 −4.6%	$418,576 −1.7%	49 +19.5%	96.2% −0.1%	2,980 −3.5%	3.7 0.0%	19%
Manatee	814 +21.9%	$494,205 −2.4%	$680,646 +2.4%	51 +10.9%	94.4% −1.5%	2,991 −8.1%	4.7 −9.6%	31%
Sarasota	890 +8.9%	$485,000 +3.3%	$706,388 −2.9%	49 +22.5%	93.8% −0.4%	3,351 −24.0%	4.8 −30.4%	42%
Region	4,922 +3.3%	By county	$581,065 +1.5%	By county	By county	16,980 −11.1%	By county	27%

6,011

NEW LISTINGS

down 16.2% year over year, five counties

5,260

NEW PENDING SALES

up 0.4% year over year, five counties

11,260

CLOSED SALES YEAR TO DATE

January through March, five counties

YEAR TO DATE, JANUARY THROUGH MARCH

3,135
HILLSBOROUGH
down 3.6% in closed sales

2,263
PINELLAS
down 9.9% in closed sales

2,016
PASCO
down 11.9% in closed sales

1,808
MANATEE
up 8.5% in closed sales

2,038
SARASOTA
up 5.8% 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.

Condominiums and Townhomes, *county by county.*

Each figure shows the March 2026 value with its change from March 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	367 +3.4%	$279,995 0.0%	$469,802 +33.9%	52 +4.0%	94.2% −0.9%	1,810 −9.3%	5.6 +1.8%	44%
Pinellas	731 +31.0%	$295,000 +7.3%	$596,530 +50.0%	58 +3.6%	92.8% −0.6%	4,163 +1.2%	8.1 0.0%	55%
Pasco	174 −17.5%	$270,700 −1.9%	$255,199 −4.5%	71 +22.4%	94.6% −1.1%	1,012 +0.8%	6.0 +42.9%	39%
Manatee	336 +12.0%	$300,000 −11.3%	$334,627 −8.5%	61 −1.6%	92.9% −1.4%	1,597 −12.1%	7.1 −13.4%	55%
Sarasota	455 +40.4%	$359,500 +3.8%	$558,178 +0.3%	65 +41.3%	92.3% +0.1%	2,392 −11.9%	8.1 −16.5%	65%
Region	2,063 +18.0%	By county	$494,086 +24.6%	By county	By county	10,974 −5.7%	By county	54%

2,741

NEW LISTINGS

down 13.0% year over year, five counties

2,190

NEW PENDING SALES

up 10.6% year over year, five counties

4,792

CLOSED SALES YEAR TO DATE

January through March, five counties

YEAR TO DATE, JANUARY THROUGH MARCH

848
HILLSBOROUGH
down 8.3% in closed sales

1,786
PINELLAS
up 26.1% in closed sales

408
PASCO
down 34.0% in closed sales

709
MANATEE
down 1.9% in closed sales

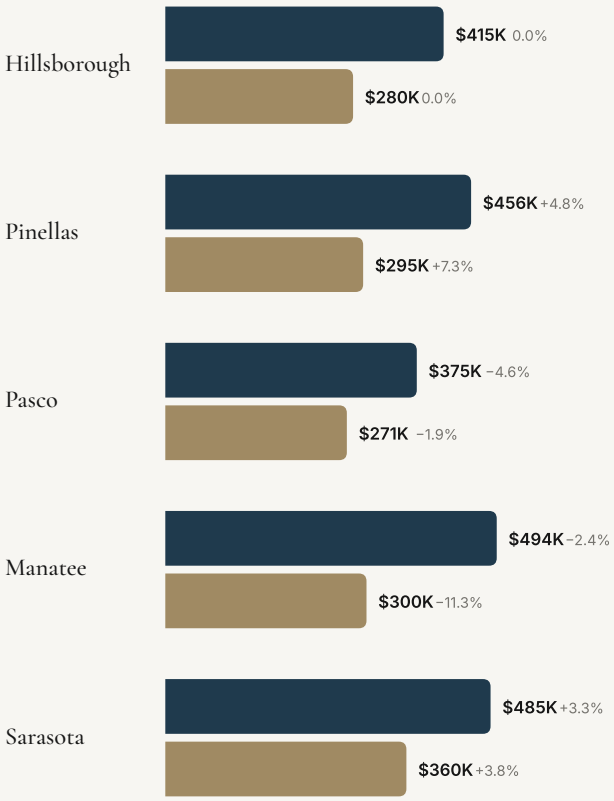
1,041
SARASOTA
up 29.6% in closed sales

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.

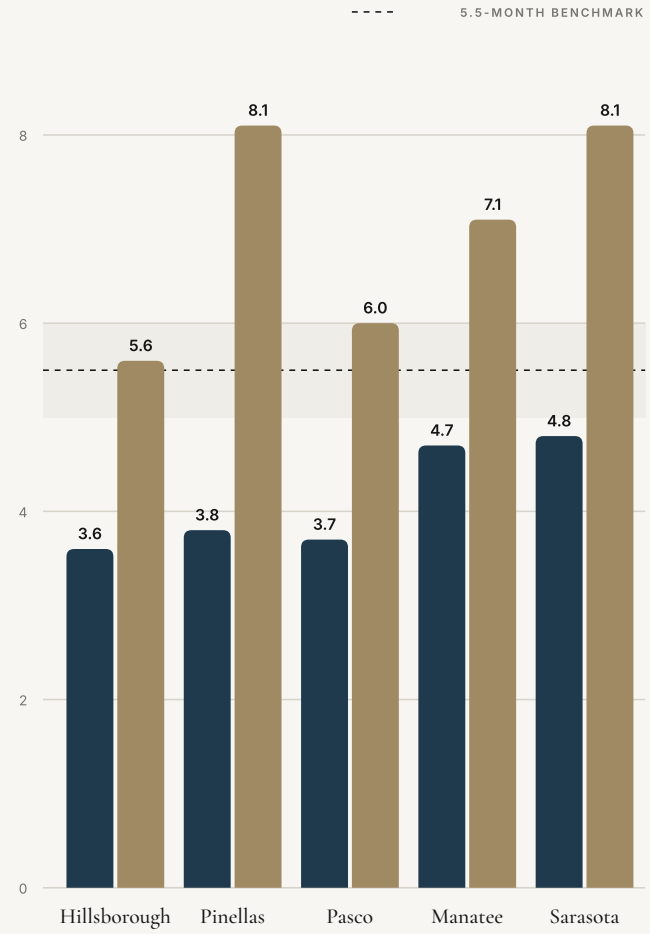
Where values sit, *and how much is for sale.*

SINGLE-FAMILY CONDO / TOWNHOME

MEDIAN SALE PRICE, MARCH 2026, CHANGE YEAR OVER YEAR



MONTHS SUPPLY OF INVENTORY, MARCH 2026



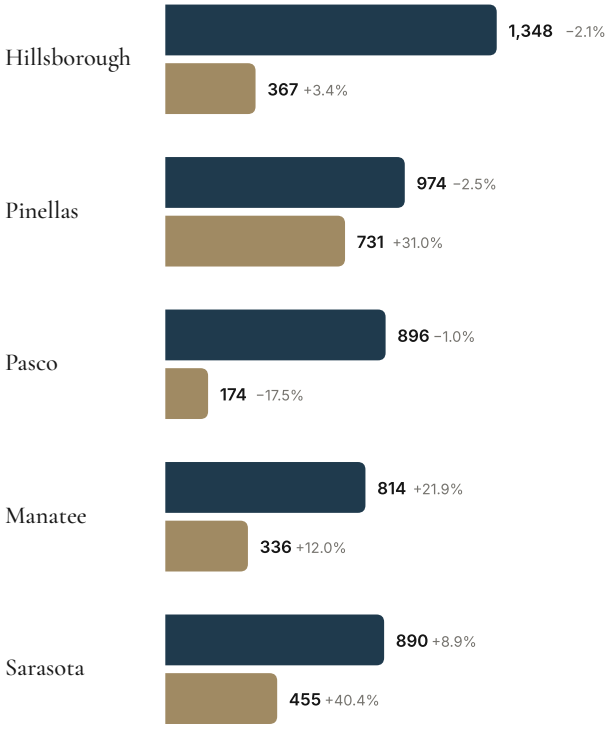
Median prices are the clearest single measure of value, but they also reflect the mix of homes that happened to sell in a given month. A month with more waterfront or new-construction closings will lift the median even if individual values are flat. That is why we pair price with supply.

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 3.6 to 4.8 months. Condominium supply ranged from 5.6 to 8.1 months.

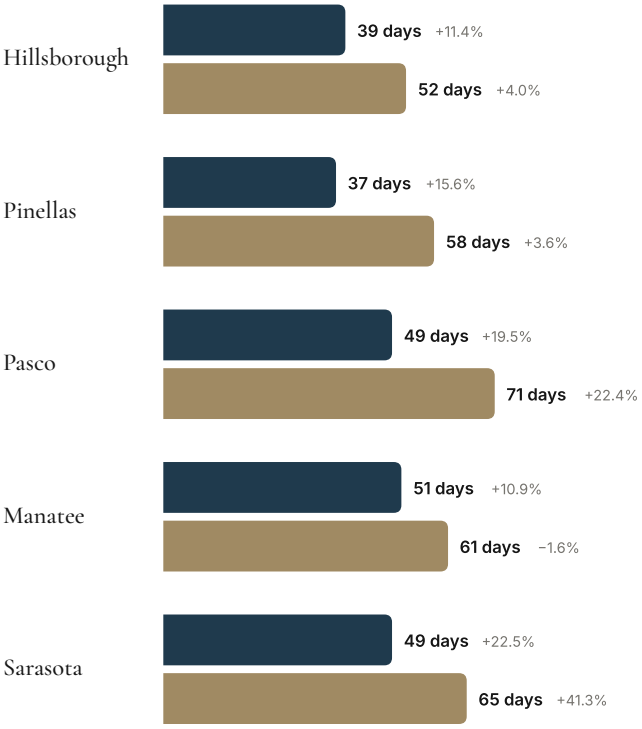
How many sold, *and how quickly.*

SINGLE-FAMILY CONDO / TOWNHOME

CLOSED SALES, MARCH 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 March, single-family homes went under contract fastest in Pinellas at 37 days and slowest in Manatee at 51 days. Rising days to contract typically precede softer pricing, and falling days typically precede firmer pricing.

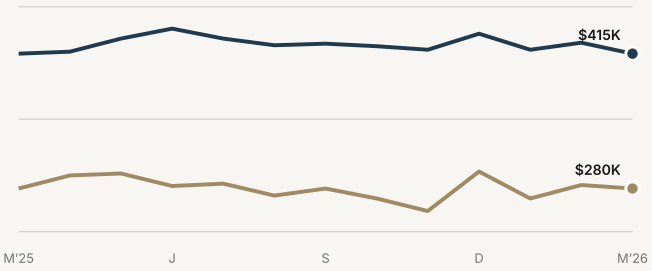
THIRTEEN-MONTH PRICE TRENDS

The line matters *more than the point.*

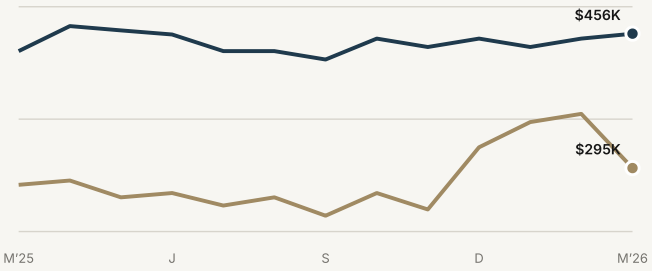
Median sale price for each county from March 2025 through March 2026. Reading a full year at once separates seasonal swings from genuine shifts in value.

SINGLE-FAMILY CONDO / TOWNHOME

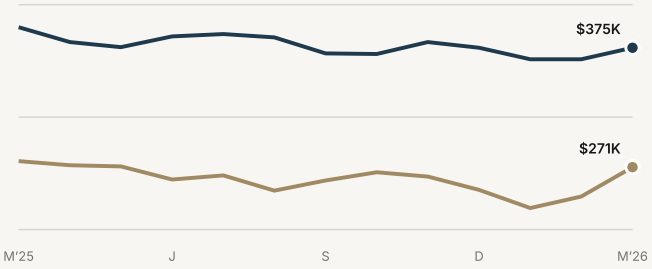
Hillsborough



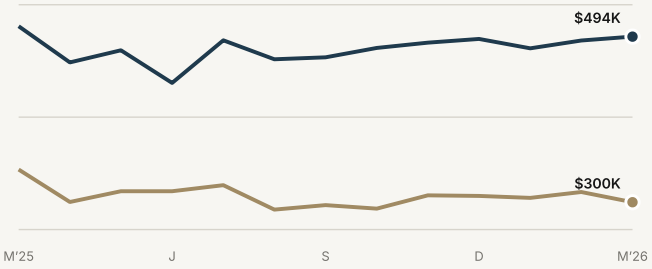
Pinellas



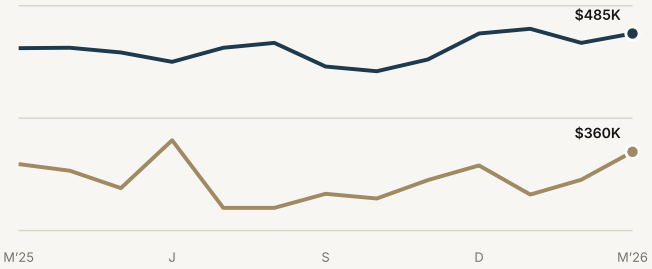
Pasco



Manatee



Sarasota



HOW TO READ THESE

Each line shows thirteen monthly medians. The labeled point is March 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 · MARCH 2026

Hillsborough *County*

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

SINGLE-FAMILY HOMES		
Closed sales	1,348	−2.1%
Median sale price	$415,000	0.0%
Average sale price	$531,511	+0.7%
Dollar volume	$716.5 M	−1.4%
Median days to contract	39	+11.4%
Median days to sale	77	+4.1%
% of original list received	96.9%	−0.2%
New listings	1,721	−13.9%
New pending sales	1,492	−3.4%
Active listings	4,396	−3.7%
Months supply	3.6	0.0%
Cash share of sales	17%	

CONDOS AND TOWNHOMES		
Closed sales	367	+3.4%
Median sale price	$279,995	0.0%
Average sale price	$469,802	+33.9%
Dollar volume	$172.4 M	+38.4%
Median days to contract	52	+4.0%
Median days to sale	93	+14.8%
% of original list received	94.2%	−0.9%
New listings	519	−22.8%
New pending sales	378	−7.6%
Active listings	1,810	−9.3%
Months supply	5.6	+1.8%
Cash share of sales	44%	

What the numbers *are saying.*

Single-family. Single-family closings in Hillsborough County totaled 1,348 in March, down 2.1 percent from a year earlier. The median sale price settled at $415,000, unchanged from a year earlier, and sellers received a median 96.9% of original list price. Homes went under contract in a median 39 days. With 4,396 active listings, the county held 3.6 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 367 closings, up 3.4 percent from a year earlier, at a median of $279,995. Supply stood at 5.6 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

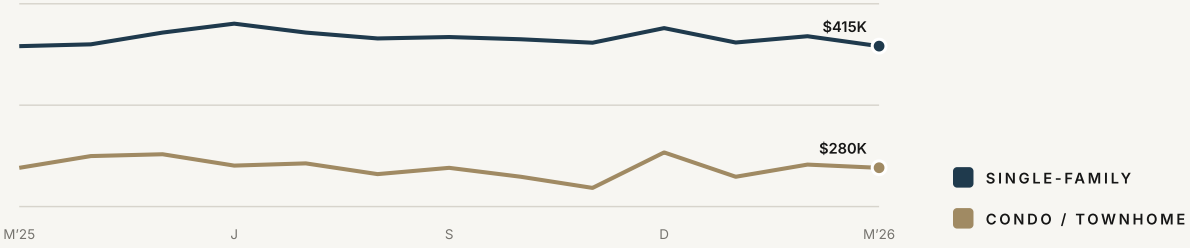
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	30	−28.6%	30	47	1.6
$200,000 to $299,999	147	−8.7%	35	317	2.2
$300,000 to $399,999	434	+4.3%	43	1,115	2.6
$400,000 to $499,999	289	+1.4%	52	996	3.4
$500,000 to $599,999	144	−23.0%	35	528	3.7
$600,000 to $699,999	92	+5.7%	23	323	3.5
$700,000 to $799,999	62	+17.0%	23	213	3.4
$800,000 to $899,999	35	−14.6%	38	157	4.5
$900,000 to $999,999	18	0.0%	41	100	5.6
$1,000,000 or more	97	+11.5%	38	600	6.2

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	77	0.0%	53	478	6.2
$200,000 to $299,999	131	+4.8%	72	571	4.4
$300,000 to $399,999	72	−1.4%	36	287	4.0
$400,000 to $499,999	25	−13.8%	46	118	4.7
$500,000 to $599,999	16	−20.0%	44	66	4.1
$600,000 to $699,999	7	−12.5%	46	56	8.0
$700,000 to $799,999	7	−12.5%	74	44	6.3
$800,000 to $899,999	3	−50.0%	130	25	8.3
$900,000 to $999,999	4	+33.3%	38	17	4.2
$1,000,000 or more	25	+316.7%	7	148	5.9

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 · MARCH 2026

Pinellas *County*

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

SINGLE-FAMILY HOMES

Closed sales	974	−2.5%
Median sale price	$456,000	+4.8%
Average sale price	$601,424	+4.0%
Dollar volume	$585.8 M	+1.4%
Median days to contract	37	+15.6%
Median days to sale	72	+7.5%
% of original list received	94.7%	0.0%
New listings	1,194	−24.4%
New pending sales	1,052	−4.2%
Active listings	3,262	−13.6%
Months supply	3.8	−15.6%
Cash share of sales	32%	

CONDOS AND TOWNHOMES

Closed sales	731	+31.0%
Median sale price	$295,000	+7.3%
Average sale price	$596,530	+50.0%
Dollar volume	$436.1 M	+96.5%
Median days to contract	58	+3.6%
Median days to sale	95	0.0%
% of original list received	92.8%	−0.6%
New listings	1,030	−2.7%
New pending sales	773	+23.3%
Active listings	4,163	+1.2%
Months supply	8.1	0.0%
Cash share of sales	55%	

What the numbers *are saying.*

Single-family. Single-family closings in Pinellas County totaled 974 in March, down 2.5 percent from a year earlier. The median sale price settled at $456,000, up 4.8 percent from a year earlier, and sellers received a median 94.7% of original list price. Homes went under contract in a median 37 days. With 3,262 active listings, the county held 3.8 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 731 closings, up 31.0 percent from a year earlier, at a median of $295,000. Supply stood at 8.1 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

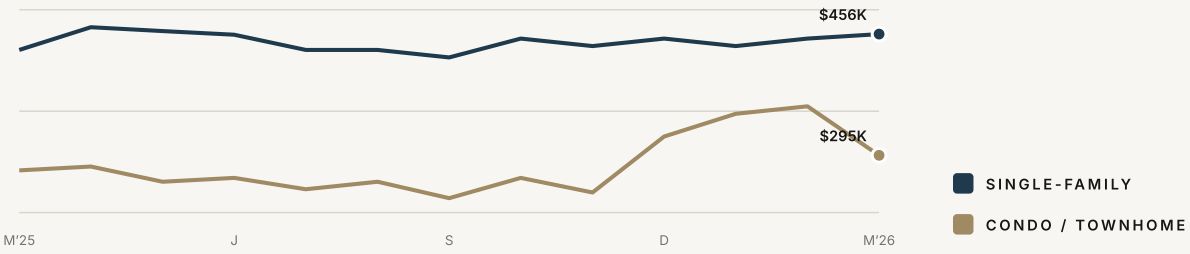
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	29	−34.1%	20	20	0.7
$200,000 to $299,999	114	−10.2%	35	212	1.9
$300,000 to $399,999	226	−8.1%	30	576	2.5
$400,000 to $499,999	187	+1.6%	36	552	3.0
$500,000 to $599,999	115	−8.7%	22	365	3.2
$600,000 to $699,999	71	+12.7%	26	279	3.9
$700,000 to $799,999	64	+20.8%	75	200	3.1
$800,000 to $899,999	32	−15.8%	41	131	4.1
$900,000 to $999,999	36	+63.6%	28	124	3.4
$1,000,000 or more	100	+4.2%	73	803	8.0

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	234	+47.2%	74	1,138	4.9
$200,000 to $299,999	135	−3.6%	53	860	6.4
$300,000 to $399,999	89	0.0%	78	546	6.1
$400,000 to $499,999	42	−26.3%	66	337	8.0
$500,000 to $599,999	39	+50.0%	107	248	6.4
$600,000 to $699,999	24	+9.1%	90	204	8.5
$700,000 to $799,999	24	+50.0%	109	152	6.3
$800,000 to $899,999	17	+142.9%	49	124	7.3
$900,000 to $999,999	9	+28.6%	50	97	10.8
$1,000,000 or more	118	+237.1%	0	457	3.9

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 · MARCH 2026

Pasco *County*

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

SINGLE-FAMILY HOMES		
Closed sales	896	−1.0%
Median sale price	$375,000	−4.6%
Average sale price	$418,576	−1.7%
Dollar volume	$375.0 M	−2.6%
Median days to contract	49	+19.5%
Median days to sale	92	+4.5%
% of original list received	96.2%	−0.1%
New listings	1,147	−13.8%
New pending sales	990	−3.0%
Active listings	2,980	−3.5%
Months supply	3.7	0.0%
Cash share of sales	19%	

CONDOS AND TOWNHOMES		
Closed sales	174	−17.5%
Median sale price	$270,700	−1.9%
Average sale price	$255,199	−4.5%
Dollar volume	$44.4 M	−21.2%
Median days to contract	71	+22.4%
Median days to sale	110	+13.4%
% of original list received	94.6%	−1.1%
New listings	252	−28.0%
New pending sales	180	−21.7%
Active listings	1,012	+0.8%
Months supply	6.0	+42.9%
Cash share of sales	39%	

What the numbers *are saying.*

Single-family. Single-family closings in Pasco County totaled 896 in March, down 1.0 percent from a year earlier. The median sale price settled at $375,000, down 4.6 percent from a year earlier, and sellers received a median 96.2% of original list price. Homes went under contract in a median 49 days. With 2,980 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 174 closings, down 17.5 percent from a year earlier, at a median of $270,700. Supply stood at 6.0 months, near balance by the same measure.

ACTIVITY BY PRICE RANGE

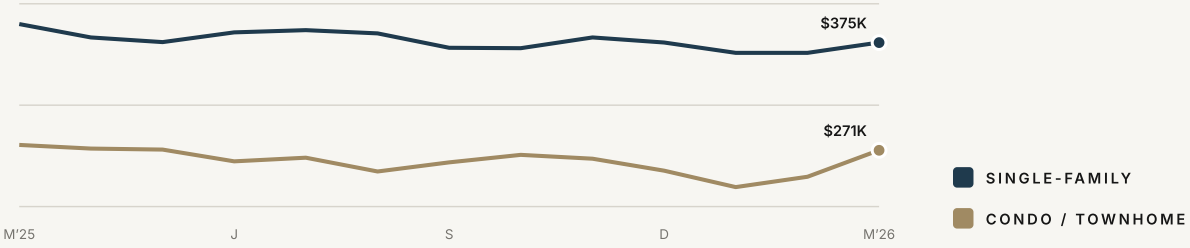
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	63	−13.7%	17	87	1.4
$200,000 to $299,999	180	−0.6%	48	606	3.4
$300,000 to $399,999	261	+16.0%	58	746	2.9
$400,000 to $499,999	167	−15.7%	54	557	3.3
$500,000 to $599,999	105	+6.1%	38	371	3.5
$600,000 to $699,999	47	+11.9%	44	226	4.8
$700,000 to $799,999	30	−11.8%	73	108	3.6
$800,000 to $899,999	17	+21.4%	49	86	5.1
$900,000 to $999,999	9	−35.7%	24	55	6.1
$1,000,000 or more	17	−32.0%	37	138	8.1

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	50	+11.1%	107	357	7.1
$200,000 to $299,999	70	−16.7%	46	362	5.2
$300,000 to $399,999	47	−36.5%	54	223	4.7
$400,000 to $499,999	5	−28.6%	252	47	9.4
$500,000 to $599,999	2	+100.0%	283	8	4.0
$600,000 to $699,999	0	N/A	·	8	·
$700,000 to $799,999	0	N/A	·	5	·
$800,000 to $899,999	0	N/A	·	0	·
$900,000 to $999,999	0	N/A	·	0	·
$1,000,000 or more	0	N/A	·	2	·

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 · MARCH 2026

Manatee *County*

BRADENTON, LAKEWOOD RANCH, PALMETTO AND ANNA MARIA ISLAND

SINGLE-FAMILY HOMES		
Closed sales	814	+21.9%
Median sale price	$494,205	−2.4%
Average sale price	$680,646	+2.4%
Dollar volume	$554.0 M	+24.7%
Median days to contract	51	+10.9%
Median days to sale	102	+7.4%
% of original list received	94.4%	−1.5%
New listings	951	−8.6%
New pending sales	831	+12.8%
Active listings	2,991	−8.1%
Months supply	4.7	−9.6%
Cash share of sales	31%	

CONDOS AND TOWNHOMES		
Closed sales	336	+12.0%
Median sale price	$300,000	−11.3%
Average sale price	$334,627	−8.5%
Dollar volume	$112.4 M	+2.5%
Median days to contract	61	−1.6%
Median days to sale	105	−0.9%
% of original list received	92.9%	−1.4%
New listings	377	−13.5%
New pending sales	357	+4.4%
Active listings	1,597	−12.1%
Months supply	7.1	−13.4%
Cash share of sales	55%	

What the numbers *are saying.*

Single-family. Single-family closings in Manatee County totaled 814 in March, up 21.9 percent from a year earlier. The median sale price settled at $494,205, down 2.4 percent from a year earlier, and sellers received a median 94.4% of original list price. Homes went under contract in a median 51 days. With 2,991 active listings, the county held 4.7 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 336 closings, up 12.0 percent from a year earlier, at a median of $300,000. Supply stood at 7.1 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

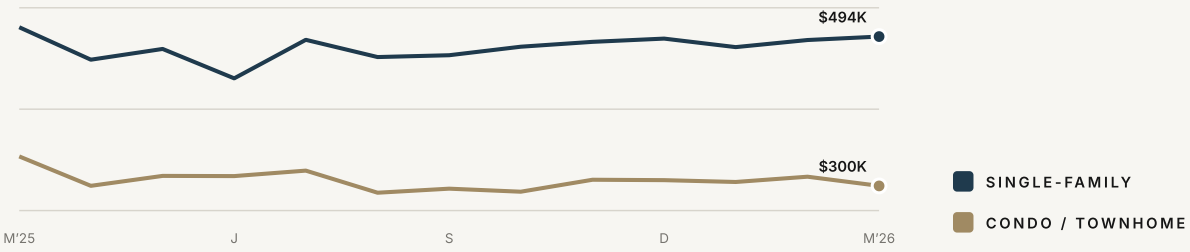
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	9	−18.2%	3	16	1.8
$200,000 to $299,999	43	+104.8%	44	81	1.9
$300,000 to $399,999	201	+16.2%	45	515	2.6
$400,000 to $499,999	164	+32.3%	68	626	3.8
$500,000 to $599,999	105	+14.1%	51	390	3.7
$600,000 to $699,999	65	−3.0%	39	263	4.0
$700,000 to $799,999	56	+55.6%	52	193	3.4
$800,000 to $899,999	36	+9.1%	43	147	4.1
$900,000 to $999,999	23	−14.8%	35	117	5.1
$1,000,000 or more	112	+33.3%	64	643	5.7

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	58	+61.1%	49	364	6.3
$200,000 to $299,999	106	+35.9%	52	393	3.7
$300,000 to $399,999	102	+1.0%	57	364	3.6
$400,000 to $499,999	32	−27.3%	69	142	4.4
$500,000 to $599,999	14	−30.0%	56	96	6.9
$600,000 to $699,999	10	+233.3%	59	65	6.5
$700,000 to $799,999	5	−28.6%	115	58	11.6
$800,000 to $899,999	4	−20.0%	77	29	7.2
$900,000 to $999,999	2	N/A	144	20	10.0
$1,000,000 or more	3	−50.0%	101	66	22.0

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 · MARCH 2026

Sarasota *County*

SARASOTA, VENICE, NORTH PORT AND LONGBOAT KEY

SINGLE-FAMILY HOMES		
Closed sales	890	+8.9%
Median sale price	$485,000	+3.3%
Average sale price	$706,388	−2.9%
Dollar volume	$628.7 M	+5.8%
Median days to contract	49	+22.5%
Median days to sale	88	+7.3%
% of original list received	93.8%	−0.4%
New listings	998	−18.6%
New pending sales	895	+6.9%
Active listings	3,351	−24.0%
Months supply	4.8	−30.4%
Cash share of sales	42%	

CONDOS AND TOWNHOMES		
Closed sales	455	+40.4%
Median sale price	$359,500	+3.8%
Average sale price	$558,178	+0.3%
Dollar volume	$254.0 M	+40.9%
Median days to contract	65	+41.3%
Median days to sale	104	+23.8%
% of original list received	92.3%	+0.1%
New listings	563	−11.2%
New pending sales	502	+34.9%
Active listings	2,392	−11.9%
Months supply	8.1	−16.5%
Cash share of sales	65%	

What the numbers *are saying.*

Single-family. Single-family closings in Sarasota County totaled 890 in March, up 8.9 percent from a year earlier. The median sale price settled at $485,000, up 3.3 percent from a year earlier, and sellers received a median 93.8% of original list price. Homes went under contract in a median 49 days. With 3,351 active listings, the county held 4.8 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 455 closings, up 40.4 percent from a year earlier, at a median of $359,500. Supply stood at 8.1 months, buyer-leaning by the same measure.

ACTIVITY BY PRICE RANGE

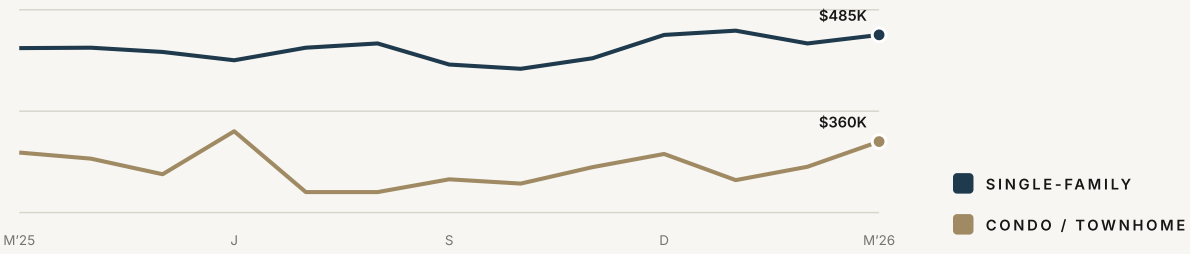
SINGLE-FAMILY HOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	19	+11.8%	21	39	2.1
$200,000 to $299,999	105	+29.6%	36	266	2.5
$300,000 to $399,999	189	−3.6%	55	641	3.4
$400,000 to $499,999	147	0.0%	55	469	3.2
$500,000 to $599,999	116	+31.8%	46	369	3.2
$600,000 to $699,999	73	+58.7%	40	271	3.7
$700,000 to $799,999	47	−16.1%	37	184	3.9
$800,000 to $899,999	34	+6.3%	87	126	3.7
$900,000 to $999,999	30	+15.4%	60	93	3.1
$1,000,000 or more	130	+1.6%	55	893	6.9

CONDOS AND TOWNHOMES

PRICE RANGE	SOLD	YOY	DAYS	LISTED	RATIO
Under $200,000	63	+90.9%	117	269	4.3
$200,000 to $299,999	103	+27.2%	55	574	5.6
$300,000 to $399,999	109	+34.6%	57	420	3.9
$400,000 to $499,999	57	+26.7%	41	226	4.0
$500,000 to $599,999	23	+4.5%	91	151	6.6
$600,000 to $699,999	18	+100.0%	144	125	6.9
$700,000 to $799,999	5	−44.4%	76	64	12.8
$800,000 to $899,999	11	+83.3%	33	70	6.4
$900,000 to $999,999	7	+250.0%	35	67	9.6
$1,000,000 or more	59	+63.9%	91	426	7.2

Sarasota median sale price, thirteen months

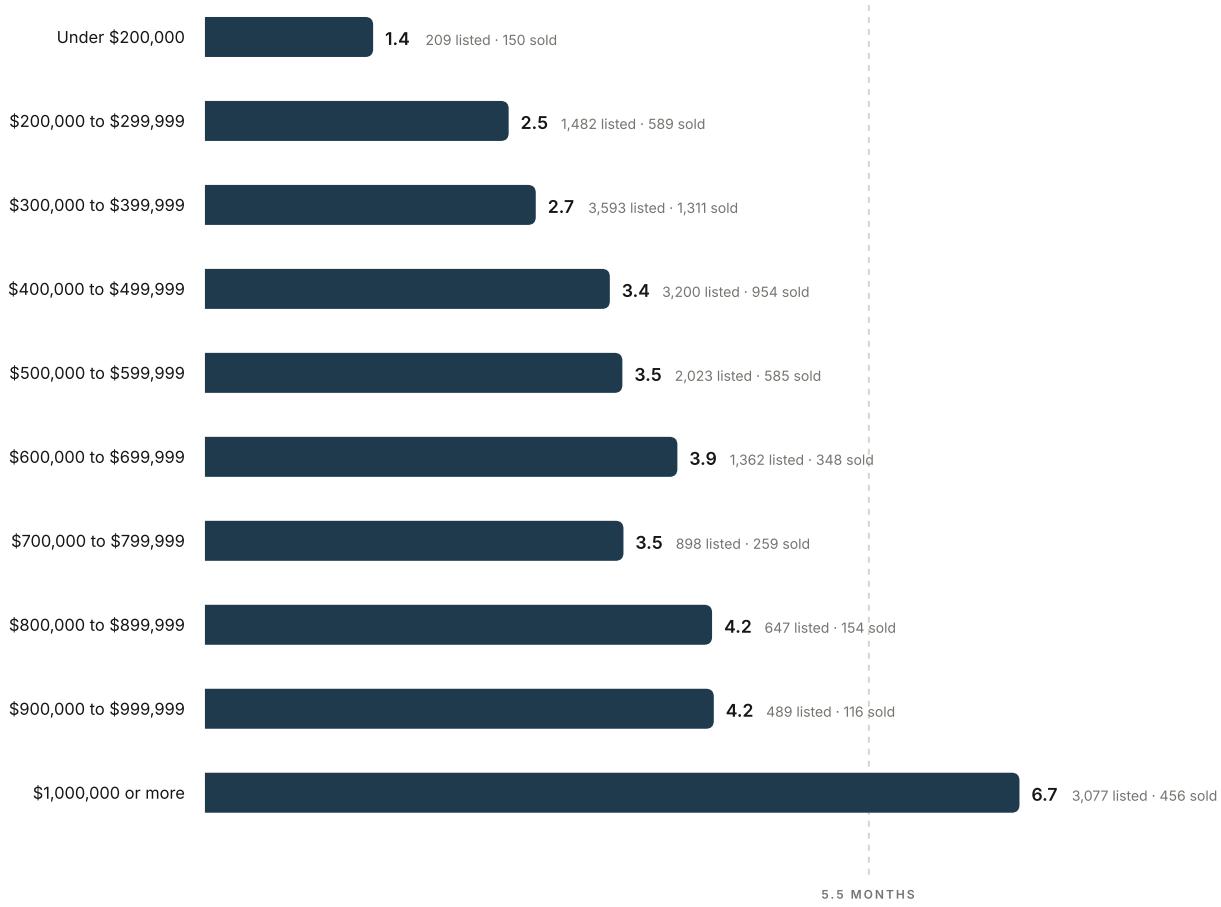


Sold and YoY: closed sales by sale price and change from a year earlier. Days: median days to contract. Listed: active listings by current list price at month end. Ratio: listings divided by the month's sales, a single-month gauge of how many months the current inventory in that range would last. A dot 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 March. The result shows where inventory is scarce and where buyers have more choice.

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



UNDER $500,000

Listings in these ranges equaled 2.8 months of March'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 March'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, 456 single-family homes sold for $1 million or more in March, against 3,077 active listings at that level at month end.

BY PRICE RANGE, FIVE COUNTIES

RANGE	SOLD	NEW LISTINGS	ACTIVE
$1M to $1.25M	145	180	582
$1.25M to $1.5M	93	161	540
$1.5M to $2M	97	167	625
$2M to $3M	74	133	580
$3M to $5M	38	91	455
$5M to $10M	9	33	224
$10M and above	0	10	71

$1M AND ABOVE, BY COUNTY

COUNTY	SOLD	YOY	ACTIVE	YOY
Hillsborough	97	+11.5%	600	−1.5%
Pinellas	100	+4.2%	803	+7.5%
Pasco	17	−32.0%	138	+29.0%
Manatee	112	+33.3%	643	−1.1%
Sarasota	130	+1.6%	893	−1.3%

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	17%	14	0.87	44%	1	0.73
Pinellas	32%	13	0.88	55%	3	0.75
Pasco	19%	9	0.86	39%	2	0.71
Manatee	31%	2	0.87	55%	1	0.95
Sarasota	42%	7	0.90	65%	3	0.89

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 54 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 March 2026 data was released on Friday, April 17, 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 March 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 March 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.

MARK ALLEN MIDDLETON

REALTOR® · BROKER ASSOCIATE

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TAMPA BAY MARKET INTELLIGENCE

March 2026

MIDDLETON
TAMPA BAY

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COMPASS

Source: Florida Realtors® Monthly Market Detail, March 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.